CONTEMI

SEAMLESS.INSURE

User Manual

May 2021

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Table of Contents

1. Introduction

The purpose of this guide is to enable internal users to understand the following with respect to the Seamless:

- Key features of solution
- The behaviour and function of screens in Seamless system

Seamless is a system assisting and automating tasks that you run in your business.

Seamless is highly configurable in terms of user roles, permissions and feature modules.

Internal and External users are able to access the system and their levels of authorisation are determined by your system administrator.

2. Seamless Screen Descriptions

Each screen description will contain:

- **Main Function**

  Overview description which explains the purpose the web page fulfills within Seamless.

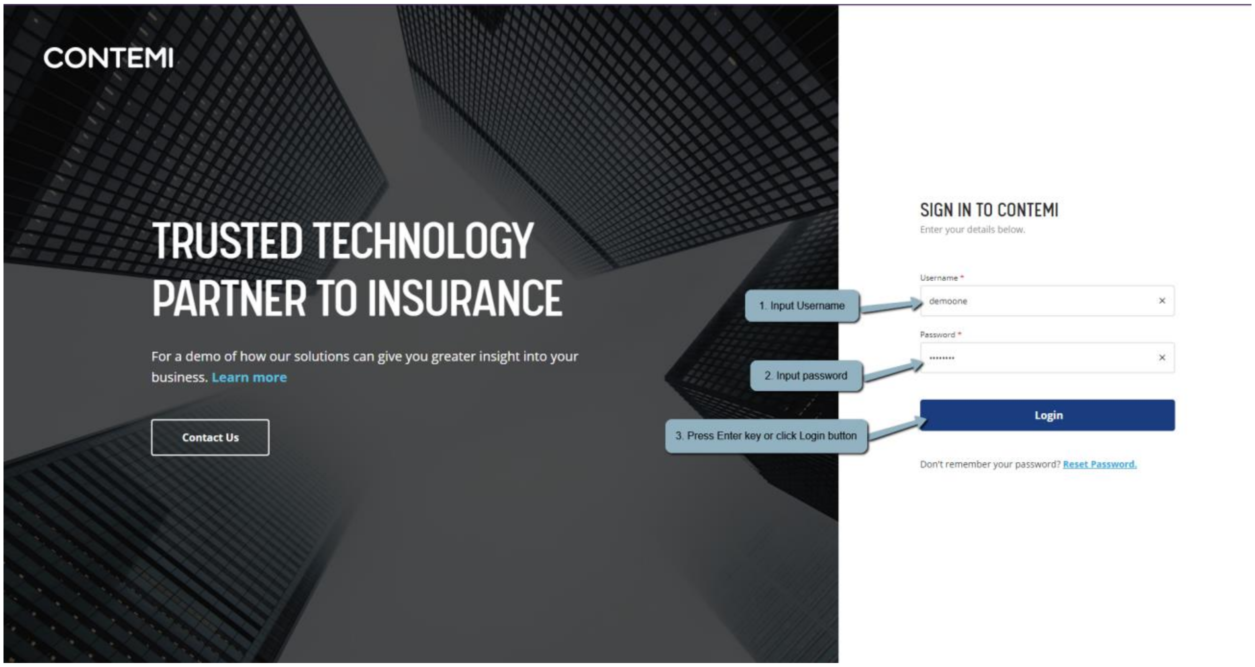
- **Screenshot**
  The screenshot, or screenshots, will display the features contained within a certain webpage.

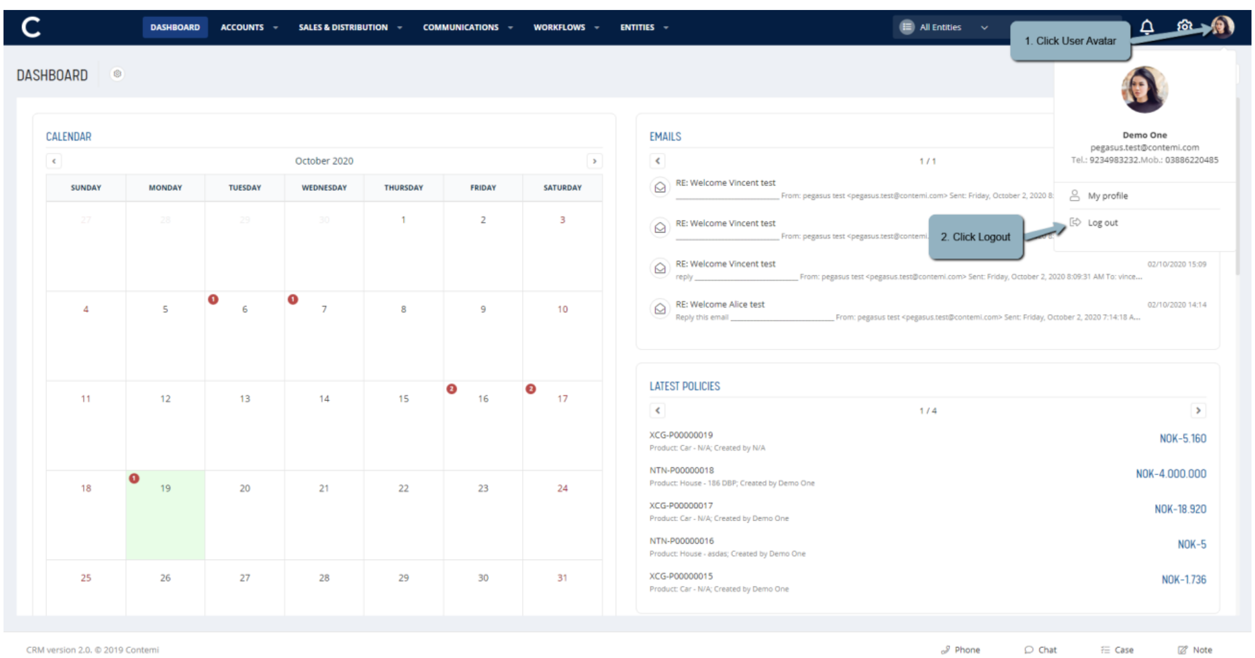
- **How to Find**
  A short navigation statement that explains how a user can navigate to the web page being described.

- **Description**
  Each functional field on the webpage will have a brief description outlining what purpose the field serves, and what format it supports.

2.1 Log in / Log out

SCREENSHOT





MAIN FUNCTION

The Login/Logout function allows authorized users to access and leave the system, the actions are logged as events which can be found in the Audit Logs page.

HOW TO FIND

- Enter the URL for the system into the browser. The Login screen will appear. All users will see the same screen before logging in.
- In order to enter the system, input your login credential into Username and Password and press Enter key / hit “Login” button.
- In order to logout, click the user avatar at the top right corner of the screen, hit “Logout”.

FIELD DESCRIPTION

Username

This is a mandatory field. Usernames are unique and should not have space in between the characters.

Password

This is a mandatory field. The input is not visible as readable characters. Each character is displayed as a dot.

Login button

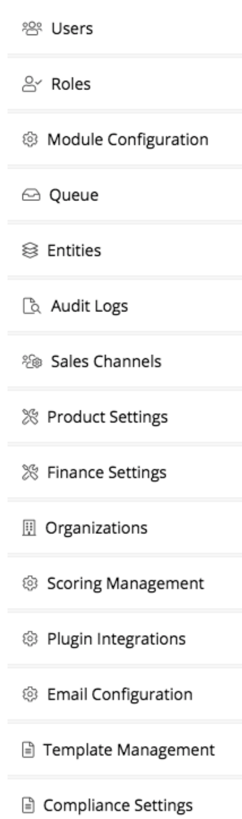
Hitting this button would send the credential you have input to the system. If it is valid, you can login successfully. If it is not valid, a red error message appears at the bottom right corner of the screen for around ten seconds saying your login credential is not valid.

Reset password

The function is not implemented yet, but it is supposed to assist the user to submit a password reset request to the system. The request is then verified by the system, if it is a valid request, the user should be able to get/set a new password.

2.2 Administration/Management

When clicking on the cogwheel icon on the right-hand side, the following menu should be displayed.



- Users
- Roles
- Module configuration
- Queue
- Entities
- Audit logs
- Sales channels
- Product settings
- Finance settings
- Organization
- Scoring Management
- Plugin Integrations
- Template Management
- Compliance Settings

2.2.1 Roles and Permissions

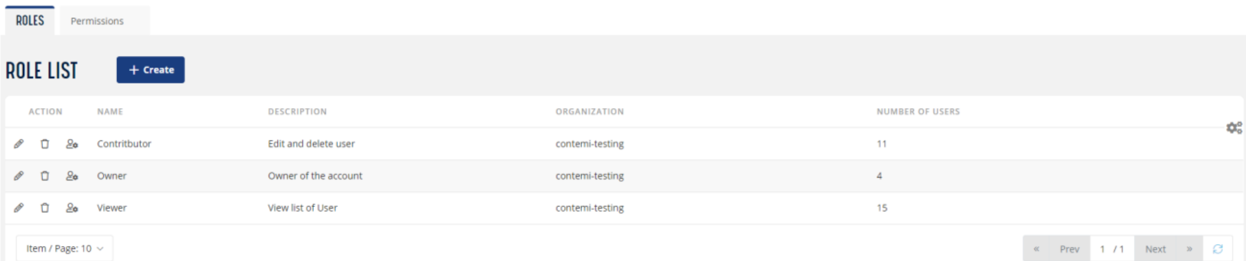
Role is a set of permissions that define which functionality that users of this role can perform in the system.

Users can access the roles list by clicking on the item “Roles” in the cogwheel icon.

A new screen would be opened with two tabs: “Role” and “Permissions”

2.2.1.1 Role

Role list displays all roles that exist in the system.



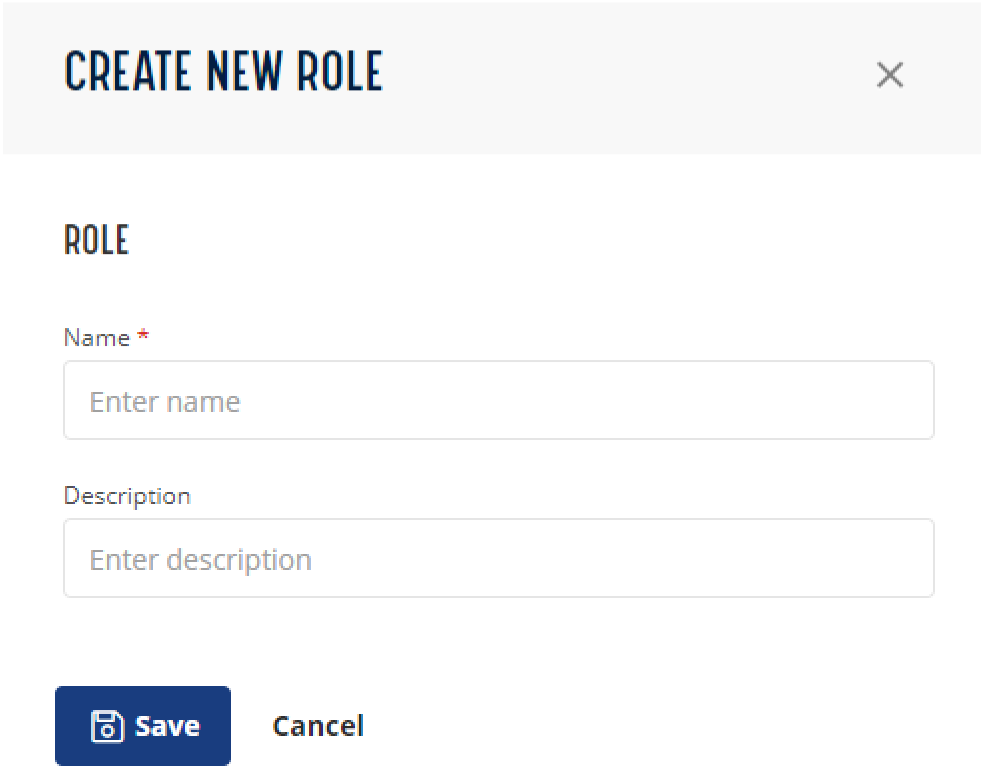
Information on roles list:

- **Action**: available actions on the current role
  - ***Edit***: users can modify the description of roles, details in section Edit role
  - ***Delete***: users can delete roles, details in section Delete role
  - ***Role Settings***: users can view which permissions that the current role include, details in section Role settings
- **Name**: name of role
- **Description**: short description on which functionality that users can perform with the current role
- **Organization**: name of organization that the current role belongs to
- **Number of users**: display the number of users who are assigned to the current role

2.2.1.1.1 Create a new role:

Clicking on the button “Create”, which is located next to the title “Role list”, popup to create a new role should display:

- Name is required in order to create a new role
- “Description” can be a short explanation on what is the current role, and what the role does

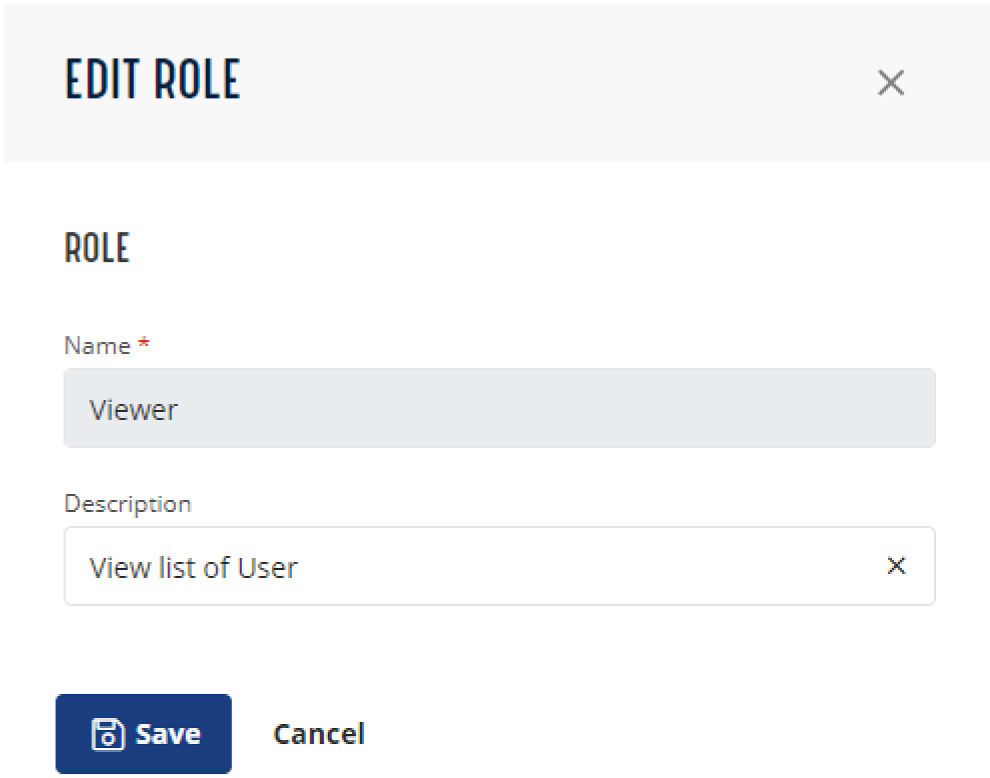


After creating the new role successfully, new roles will be visible in the role list.

2.2.1.1.2 Edit role

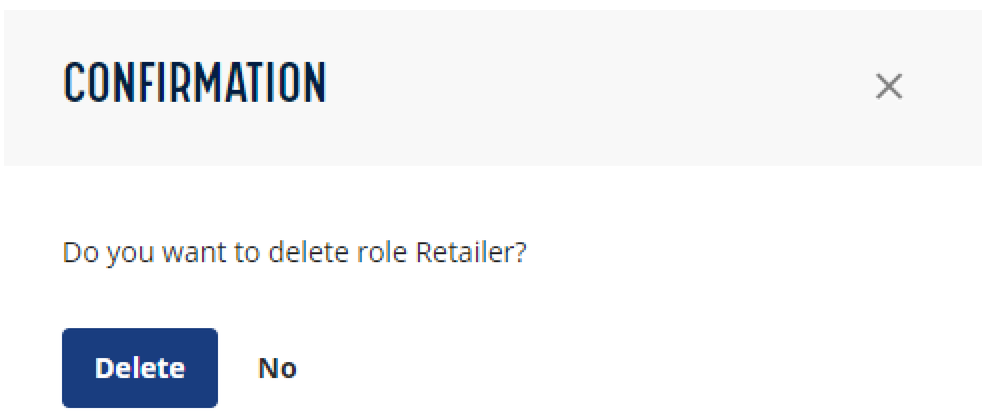
In the role list, clicking on the action icon “Edit” would trigger the modification of the selected role.

- Only the role description is editable.



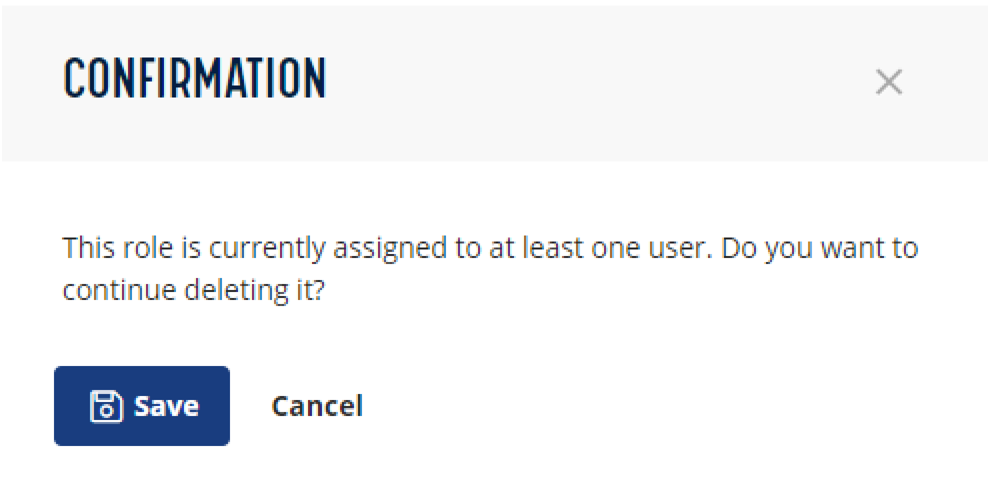
After saving changes, updated values will be shown in the role list.

2.2.1.1.3 Delete role



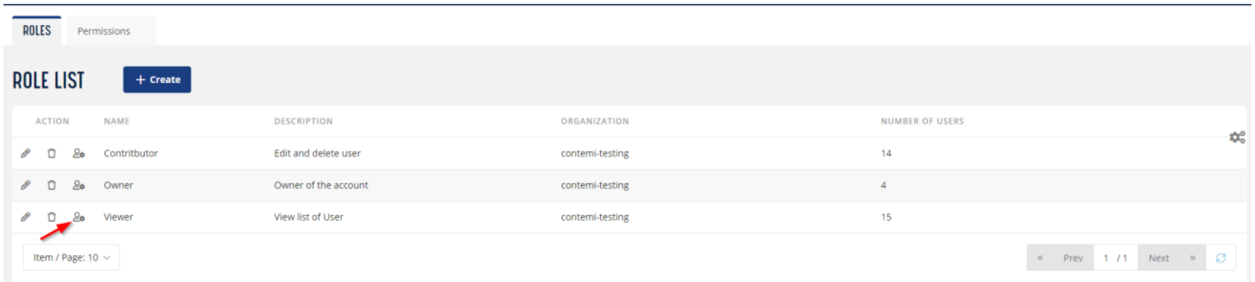
Clicking on the action icon “Delete” would open a little confirmation popup. If users still would like to delete, clicking on the button “Confirm” would trigger the delete action.

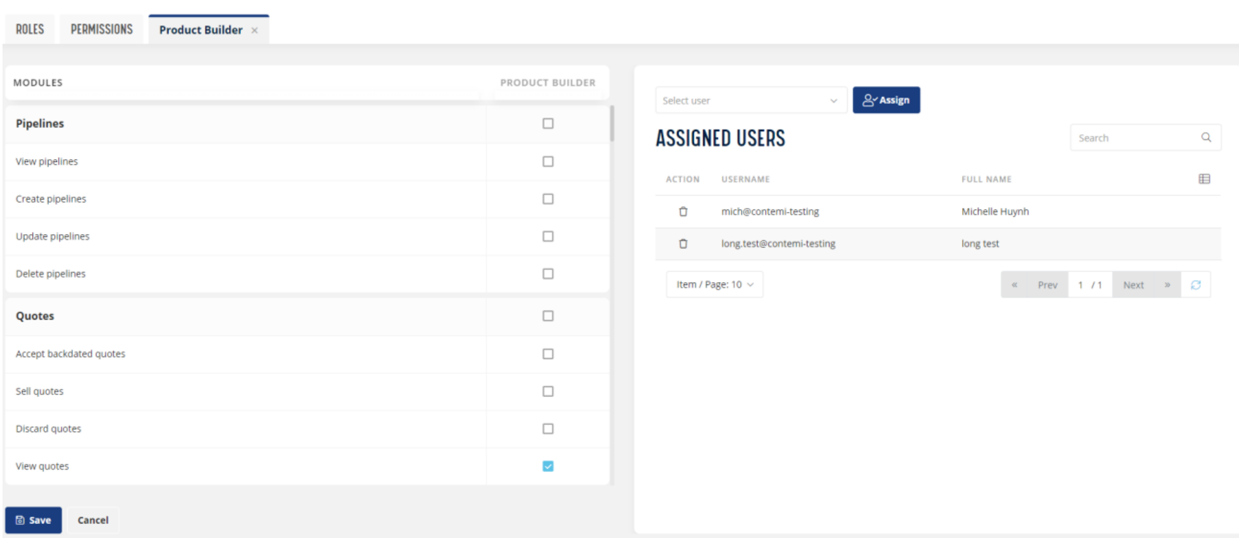
- If the current role is not assigned to any users, the role will be deleted. The success message would be displayed.
- If there is any users that are assigned to the current role, a confirmation popup will display as below:



- By clicking the button “Delete”:
    - The selected role would be removed from the assigned users
    - The selected role would be deleted
    - The selected role is no longer available in the role list

2.2.1.1.4 Role settings





Clicking on the button “Role settings” will open up a new tab, with the tab name is the role name. Page “Role settings” should include:

- On the left hand side: all permissions and those permissions that belong to the current role
- On the right hand side: users that are assigned to the current role

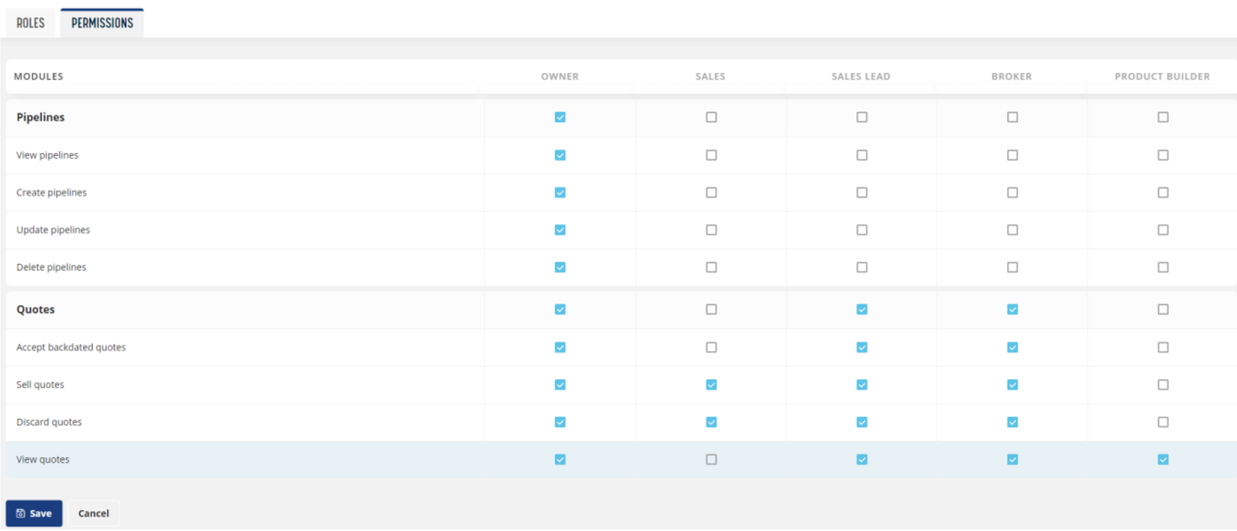
The following actions can be performed on the current page:

- Modifying permissions: by check/uncheck on the corresponding checkbox of a particular permissions, users are add/remove that permission to/from the current role
- Assigning users: users can assign/unassign users to/from the current role. Search functionality would help to search users by “Display name”.

2.2.1.2 Permissions

Below screen would display all permissions in rows and all available roles in columns:

- If permissions are available for a specific role, a corresponding checkbox should be selected. Otherwise, it should be unchecked.
- Users would be able to compare permissions among roles and make modifications on screen “Permissions” as a whole.



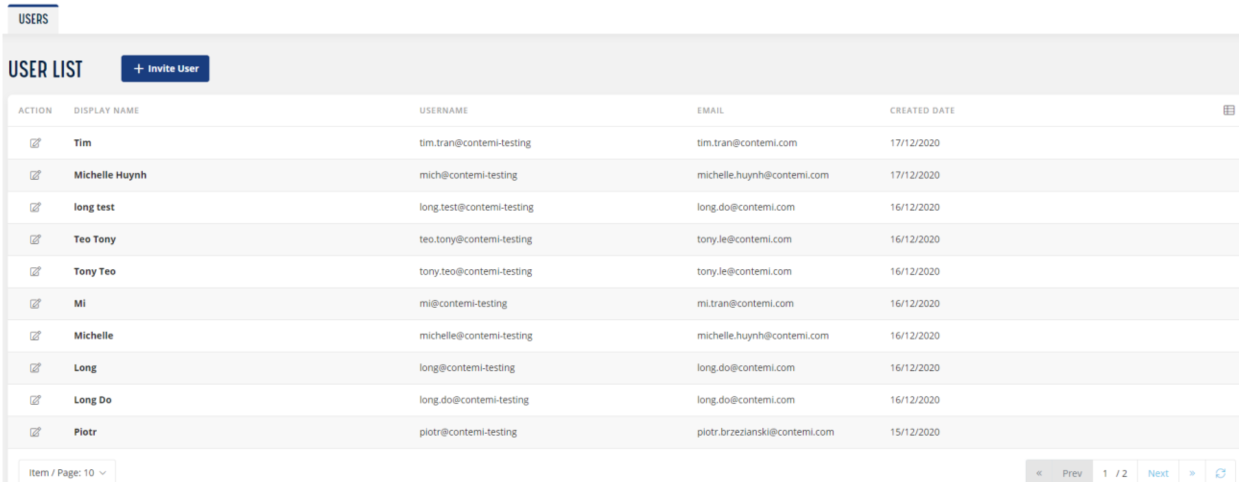
2.2.2 User

Users module is used to manage users in the system. In order to access Seamless, end-users must have an account/a username, which should be created by tenant owners, or any users that have permissions to manage users.

Clicking on the menu “Users” would open up the screen “User list”, as shown below. Information on user list:

- **Action**: available action on the current user:
  - ***Edit***: users can modify the current user’s information, except username - details in section Edit users
- **Username**: registered username of the current user, which is used to login to Seamless.
  - Username only accepts letters (a-z), number (0-9), underscore(_), dash)-), and period (.)
- **Display name**: name of the current user that would display in user profile

- **Email**: registered email of the current user
- **Created date**: the date when the current user is created


USERS

USER LIST + Invite User

ACTION	DISPLAY NAME	USERNAME	EMAIL	CREATED DATE
	Tim	tim.tran@contemi-testing	tim.tran@contemi.com	17/12/2020
	Michelle Huynh	mich@contemi-testing	michelle.huynh@contemi.com	17/12/2020
	long test	long.test@contemi-testing	long.do@contemi.com	16/12/2020
	Teo Tony	teo.tony@contemi-testing	tony.le@contemi.com	16/12/2020
	Tony Teo	tony.teo@contemi-testing	tony.le@contemi.com	16/12/2020
	Mi	mi@contemi-testing	mi.tran@contemi.com	16/12/2020
	Michelle	michelle@contemi-testing	michelle.huynh@contemi.com	16/12/2020
	Long	long@contemi-testing	long.do@contemi.com	16/12/2020
	Long Do	long.do@contemi-testing	long.do@contemi.com	16/12/2020
	Piotr	piotr@contemi-testing	piotr.brzezianski@contemi.com	15/12/2020

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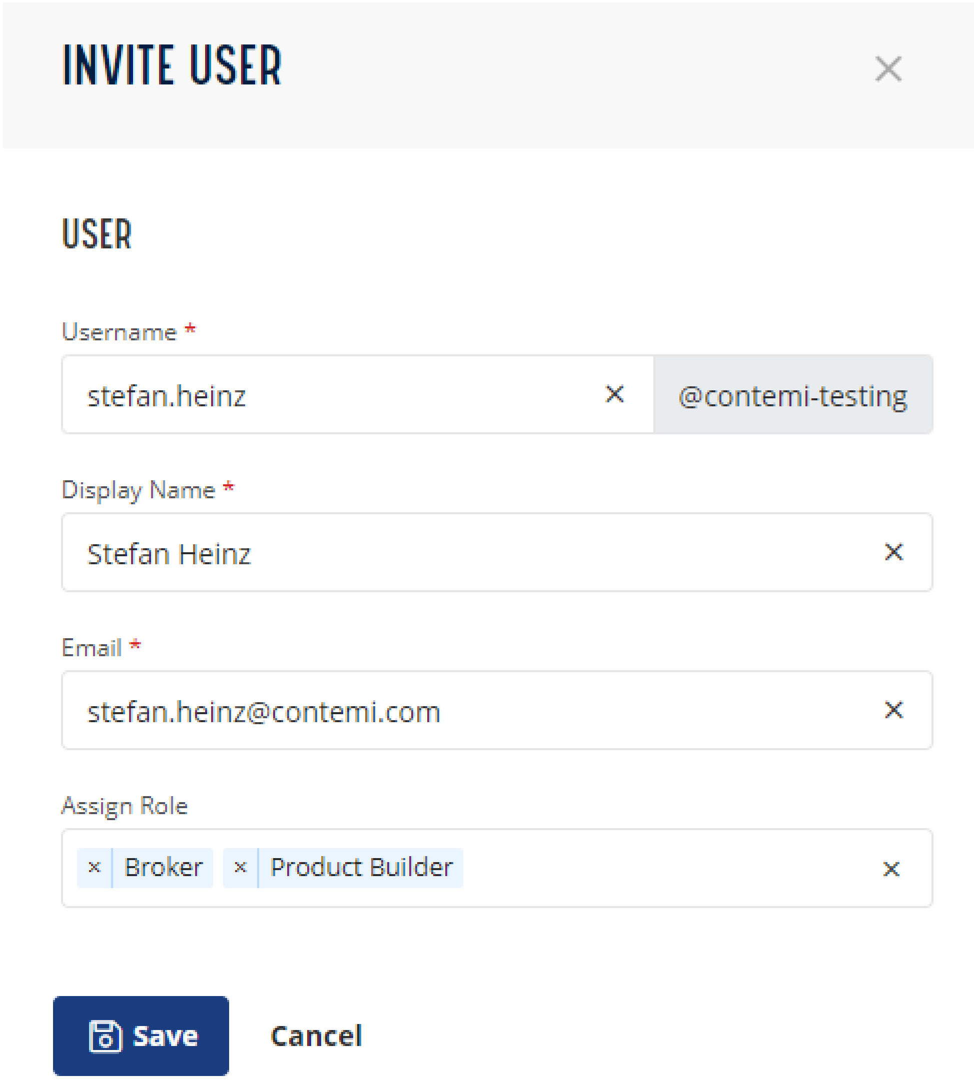
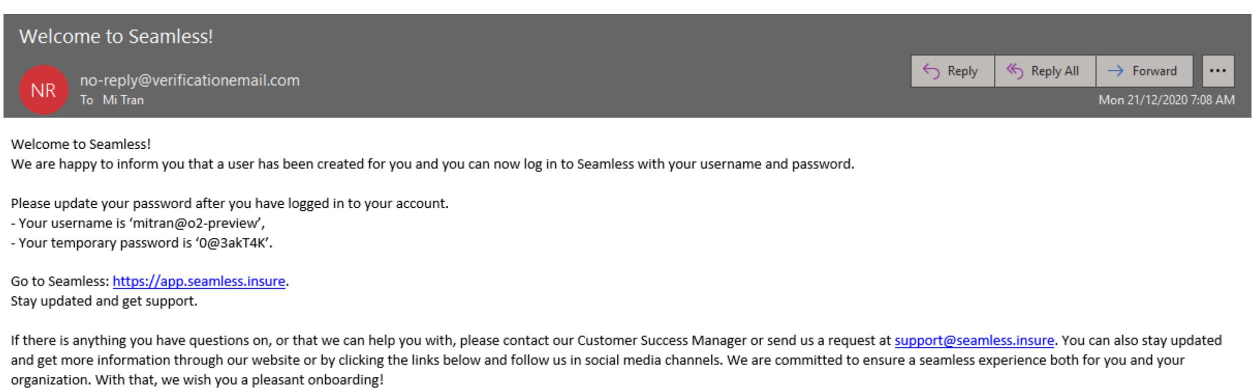
2.2.2.1 Invite new users

Clicking on button “Invite user”, which is located next to the title “User list”, popup to invite user should display:

- Users must fill in required fields to create/invite a new user
- The new user must be assigned to at least one role



After saving a new user successfully, an invitation email should be sent to the registered email, as shown below.



Welcome to Seamless!

NR no-reply@verificationemail.com
To Mi Tran

Reply Reply All Forward
Mon 21/12/2020 7:08 AM

Welcome to Seamless!
We are happy to inform you that a user has been created for you and you can now log in to Seamless with your username and password.

Please update your password after you have logged in to your account.
- Your username is 'mitran@o2-preview',
- Your temporary password is '0@3akT4K'.

Go to Seamless: https://app.seamless.insure.
Stay updated and get support.

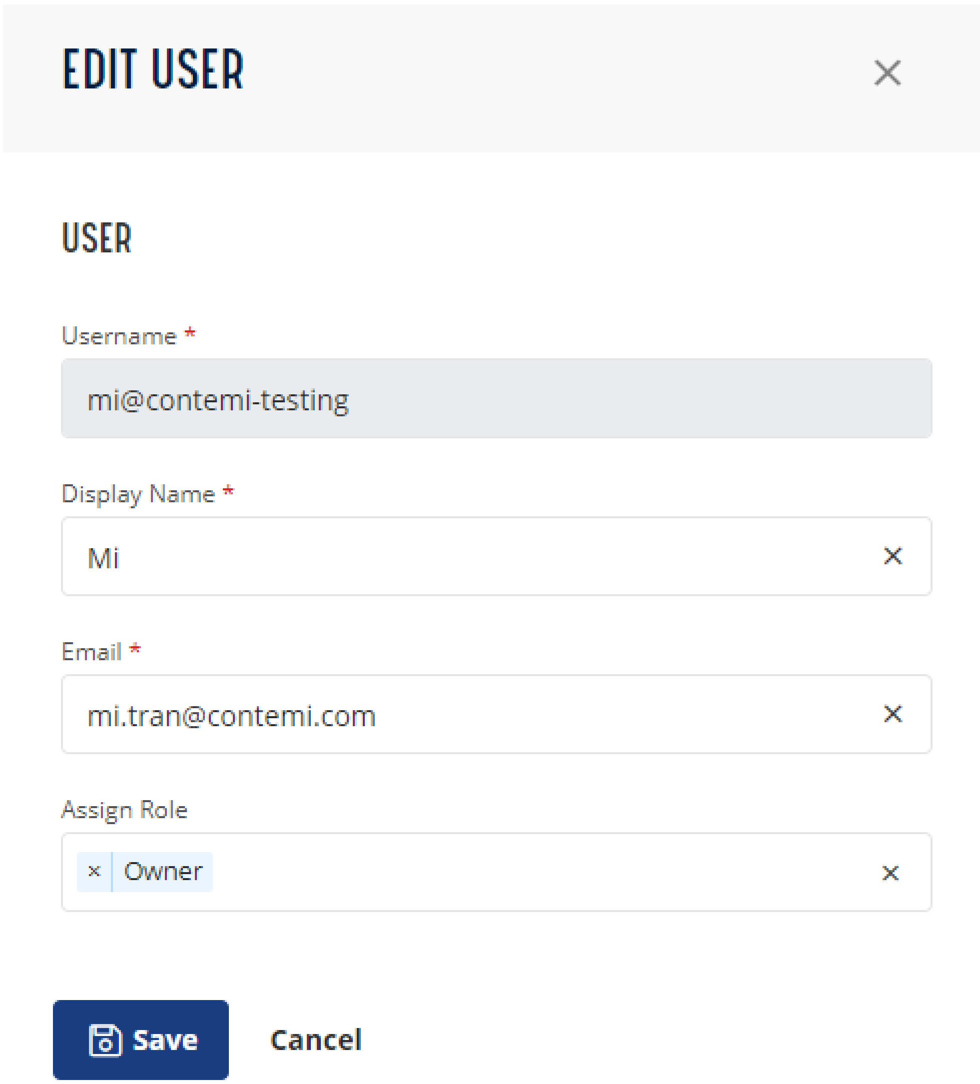
If there is anything you have questions on, or that we can help you with, please contact our Customer Success Manager or send us a request at support@seamless.insure. You can also stay updated and get more information through our website or by clicking the links below and follow us in social media channels. We are committed to ensure a seamless experience both for you and your organization. With that, we wish you a pleasant onboarding!

- The invited user should follow the link in the received invitation email.
- Login process is provided at section login.

2.2.2.2 Edit users

When clicking on the button “Edit”, the following popup should appear and allow the user to modify the following information:

- Display name
- Email
- Assign role

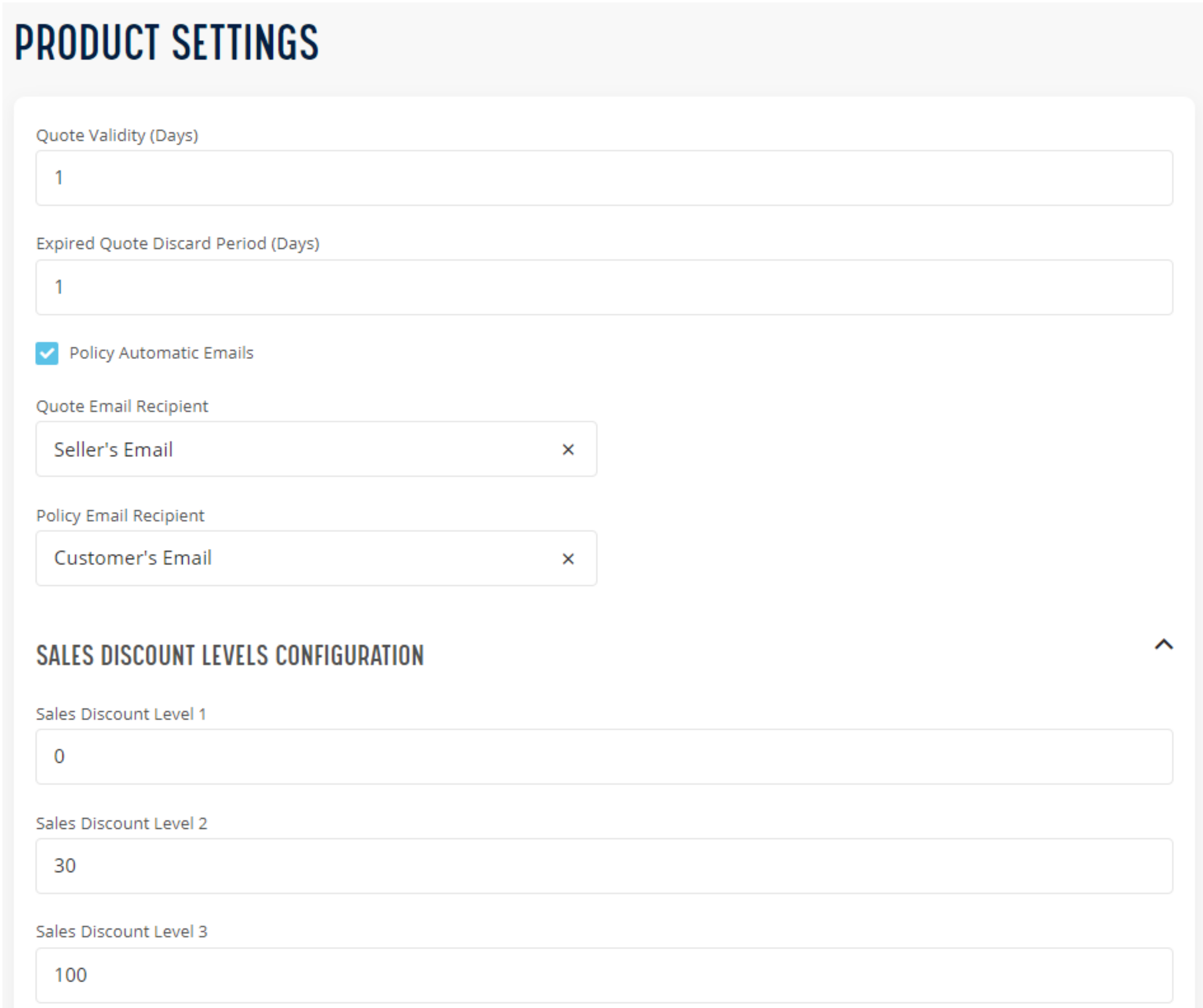


2.2.3 Product settings

Product settings is the place to keep settings that are related to products, quotes, and policies.

In order to access product settings, users should go to the cogwheel on the right side, and choose the menu “Product settings”.

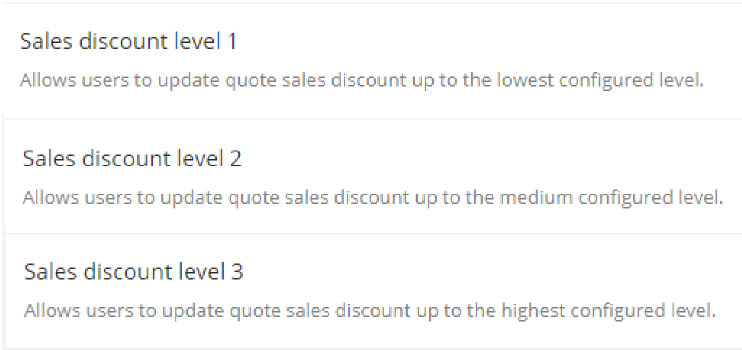
The following page with some settings related to products will be displayed.



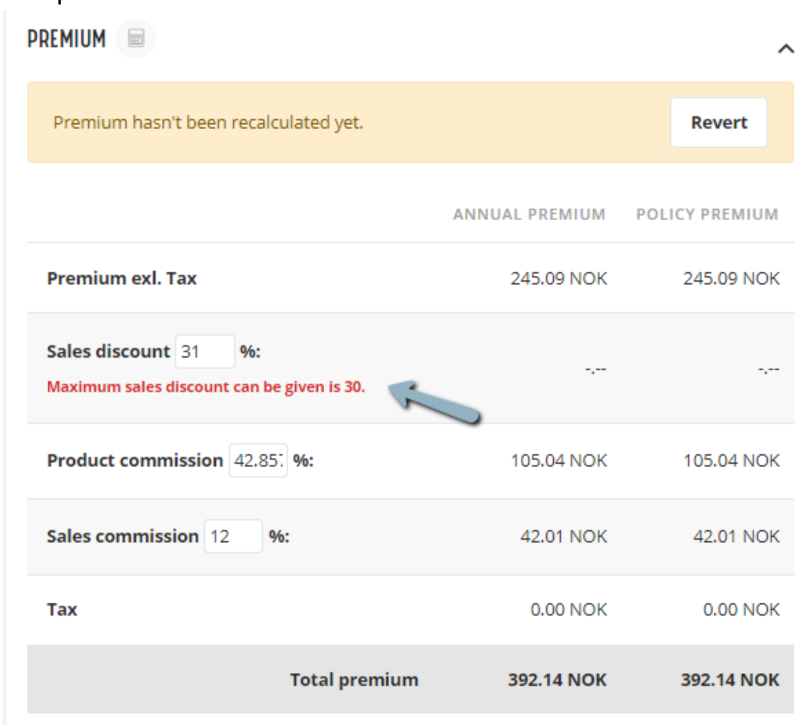
- **Quote validity (days)**: the number of days that quotes are valid from the created date. After quote validity period, if quotes are not purchased, they are set to state "Expired".
- **Expired quote discard period (days)**: the number of days that the expired quotes will be discarded automatically by the system.
- **Policy automatic emails** check box: if ticked, policy emails are automatically sent out after purchase.
- **Quote email recipient** and **Policy email recipient:** two possible answers, "Seller's Email" and "Customer's Email".
    - If "Seller's Email" is selected, emails are sent to the user who creates the quotes/policies.
    - If "Customer's Email" is selected, the recipient is the customer to whom the quotes/policies belong.
- **Sales discount levels configuration:**
    - **Sales Discount Level 1**
    - **Sales Discount Level 2**

- **Sales Discount Level 3**

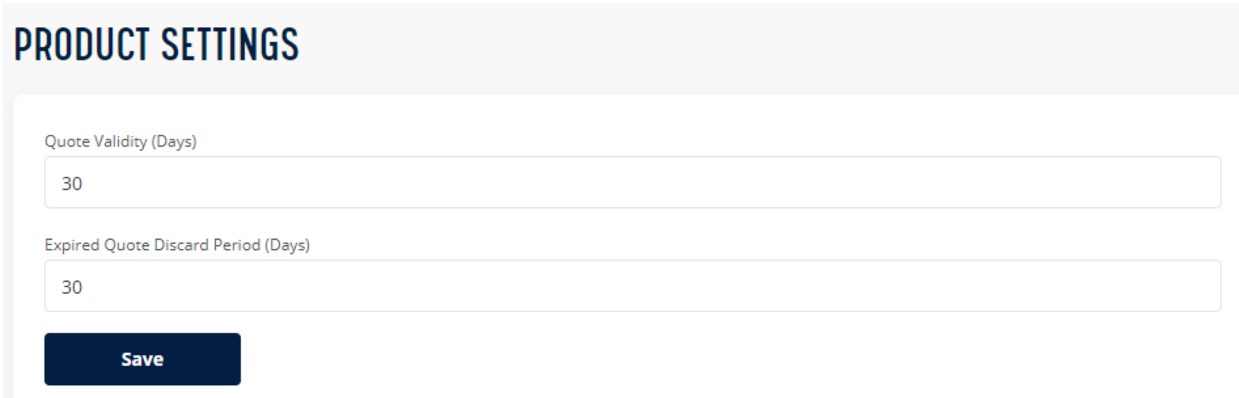
These are tied to Sales Discount permissions each of which is for a level.



For example:
A user has “Sales discount level 2” permission, and the configured value for “level 2” is “30” as in the screenshot above. This user can only input a discount percentage up to 30% during quote acceptance.



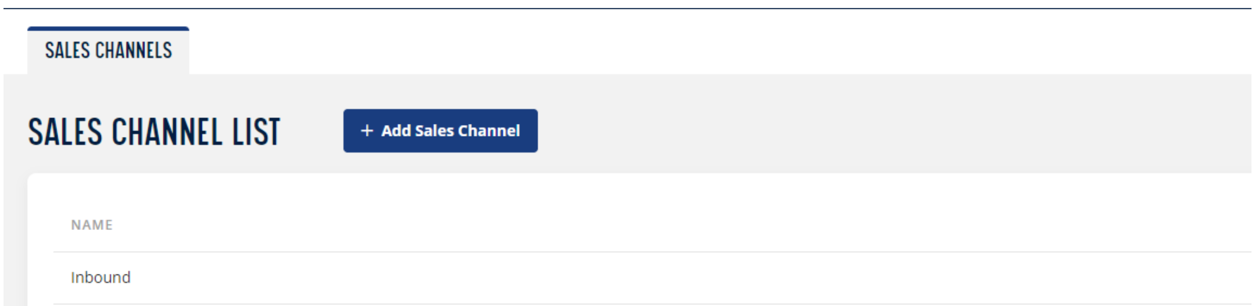
- Only those users with permission to “Manage product settings” can modify this information.



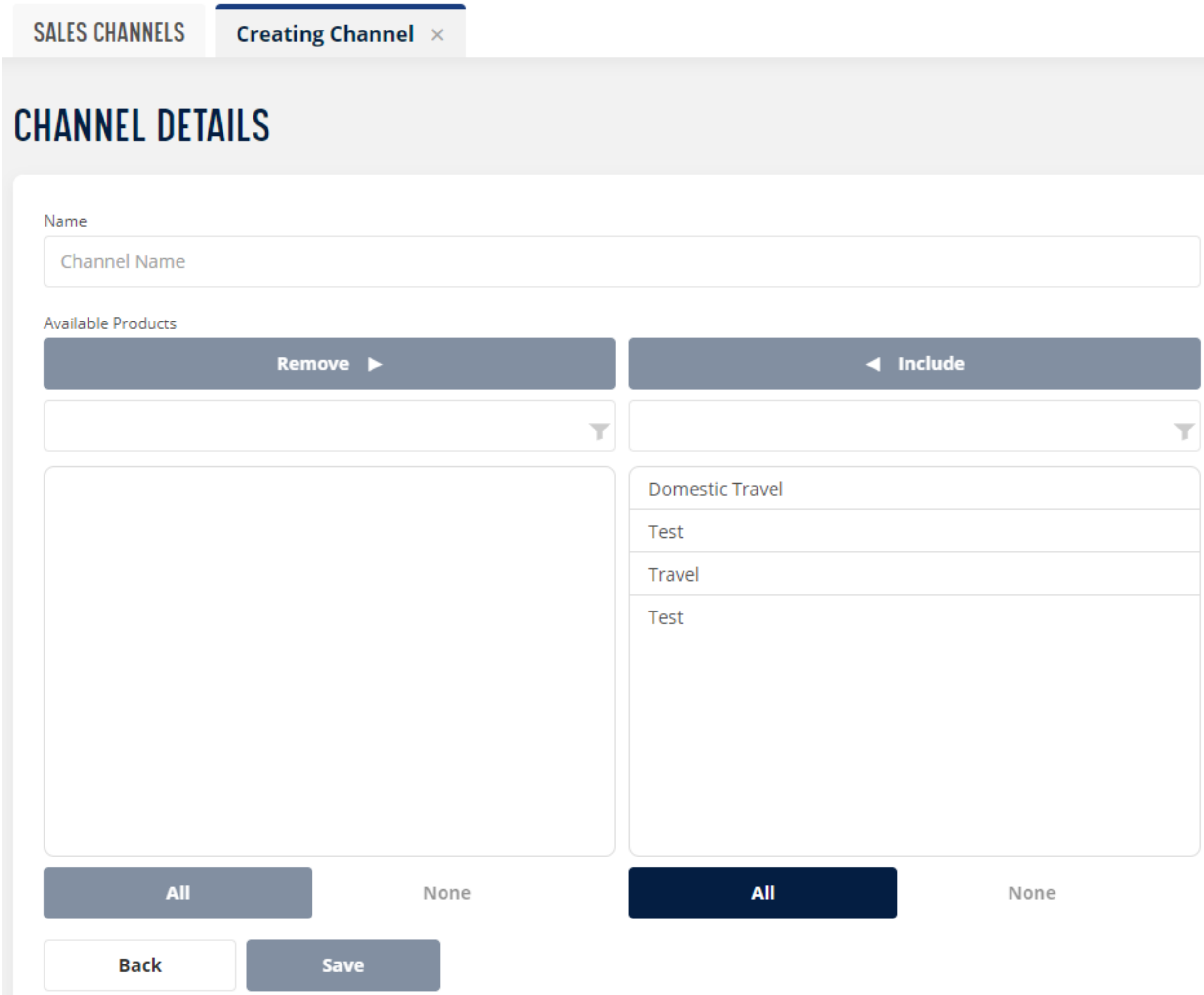
2.2.4 Sales Channels

"Sales Channels" is the place where the channels to sell insurance products are defined.

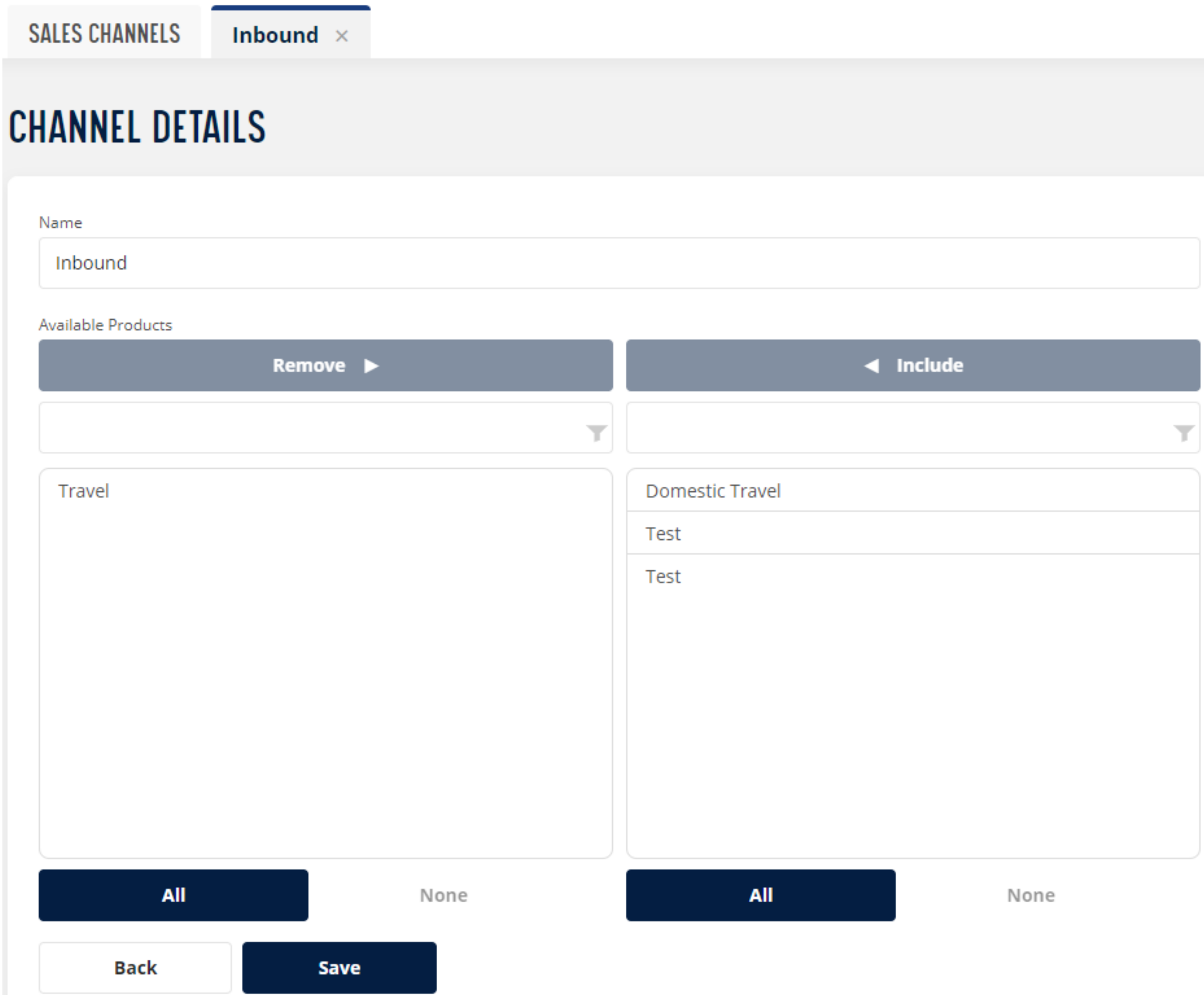
In order to access the sales channel list, users should click on the cogwheel icon, and choose the menu "Sales channels". Sequentially, the sales channels page will be displayed - as shown below.



- "**Add Sales Channel**": this button should trigger the process to add a new channel.
    - ***Name***: Users must define the channel name.
    - ***Available products***: display all products that are published, activated, and ready for sales.
        - ***The left box:*** display products that should currently be sold under the current sales channel.
        - ***The right box***: display products that are ready for sales, and can be added to the current sales channel.



- Clicking on the sales channel name would open a new tab that should display the details of the selected channel.

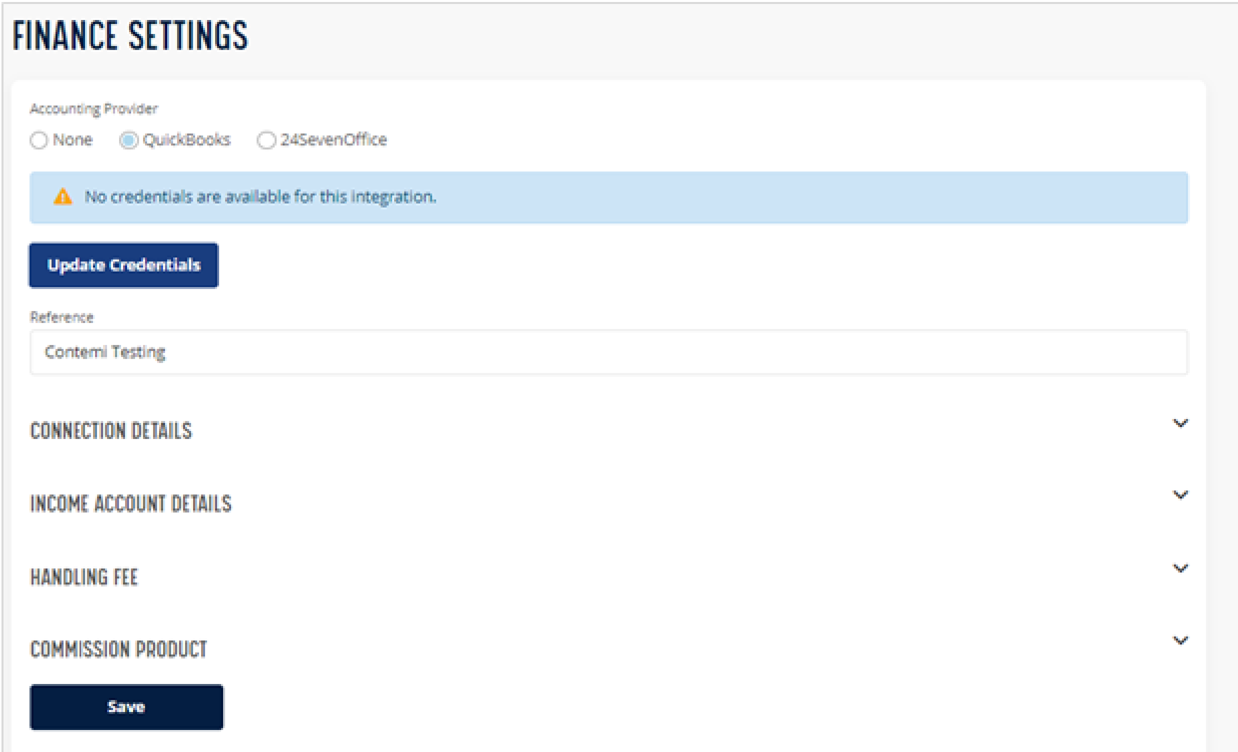


- Only users with permission to "Manage products" can modify information about sales channels.

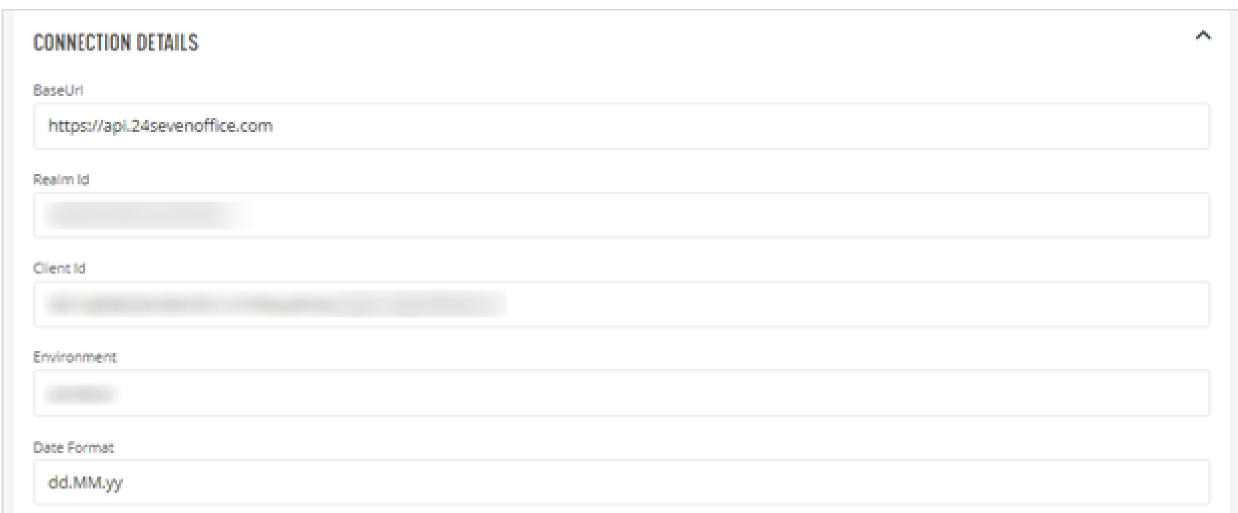
2.2.5 Finance settings

"Finance settings" is where to set up the connection between Seamless and the accounting system that the you are using. After the integration, policy payment/installment should be sent to the integrated accounting system. On the other hand, invoice/receipt of the booking should be recorded in Seamless.

At the moment, Seamless supports the integration with Quickbooks, 24SevenOffice, Tripletex and Business Central. Users must complete below form in order to create the connection. The two first mentioned accounting systems are used as examples.



Connection details:



This section consists of the connection information required for the integration.

Income account details:

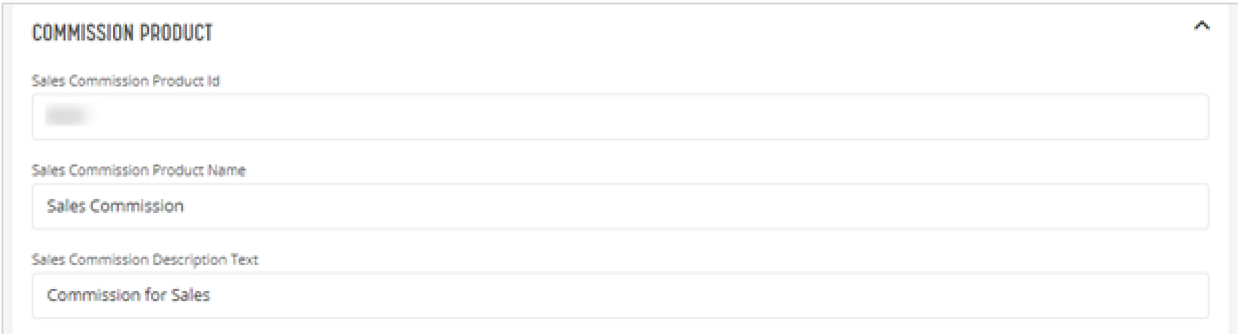
Handling fee:

In this section, user can setup the way Admin/Handling fee is charged, Fee Type can be:

- No handling fee
- OneHandlingFeePerPolicy
- HandlingFeePerCustomer

The display name of Handling Fee and Fee Refund can also be changed. They can be found in Policy Payment Schedule section and in Finance systems like QuickBooks and 25SevenOffice.

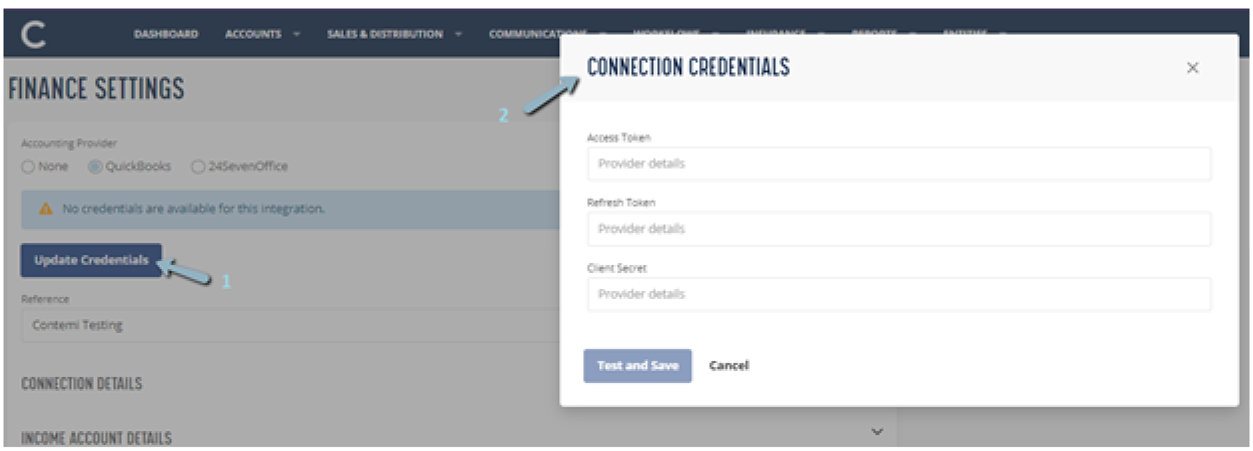
Commission product:



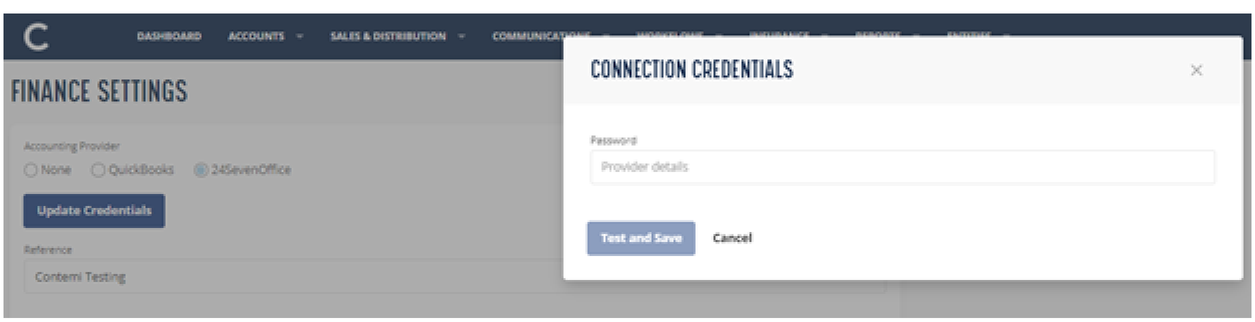
User can change the display name of commission records in this section. The display names can be found in Finance systems.

Credentials:

For QuickBooks:



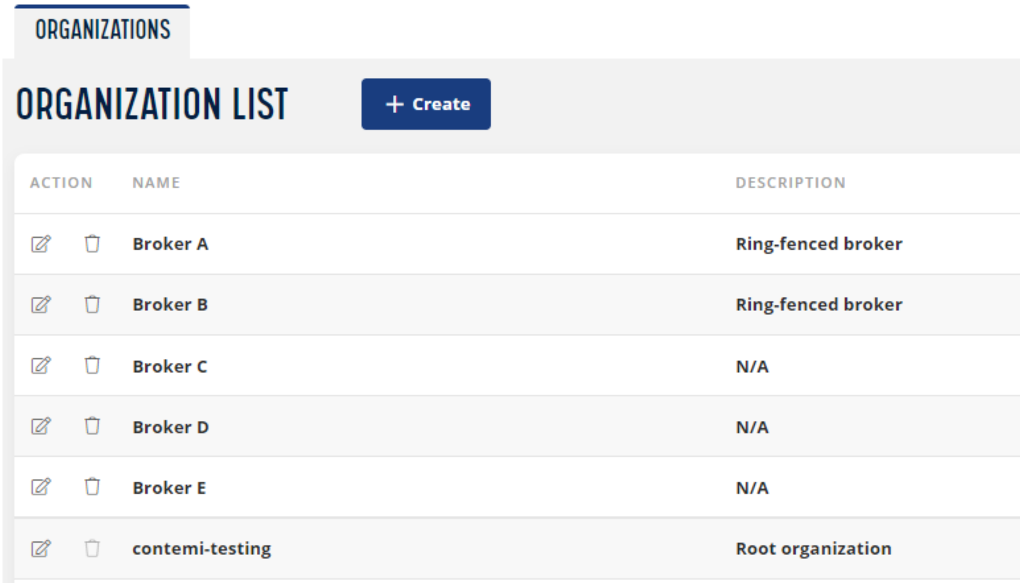
For 24SevenOffice:



The connection credential details are encrypted.

2.2.6 Organizations

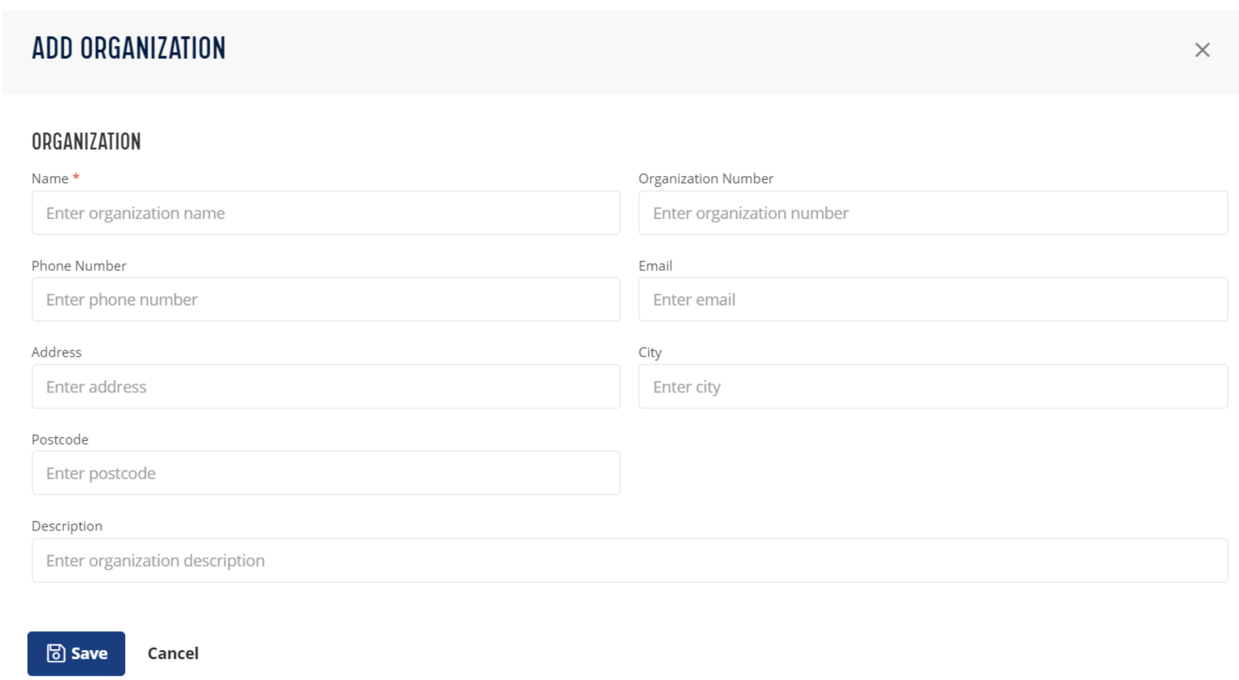
This is the place where all the tenant's organizations are managed.



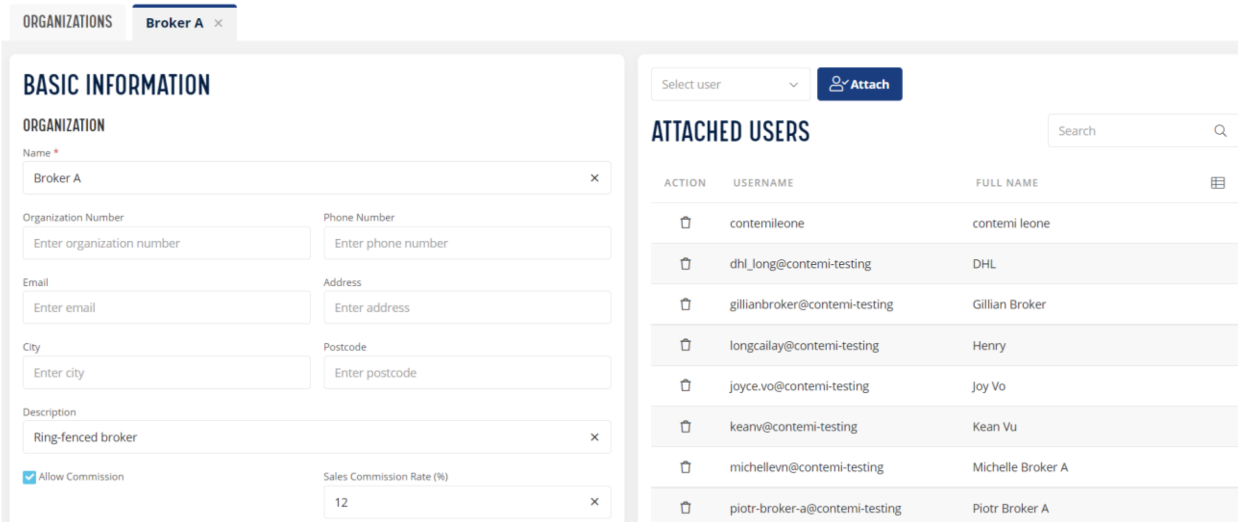
ACTION	NAME	DESCRIPTION
	Broker A	Ring-fenced broker
	Broker B	Ring-fenced broker
	Broker C	N/A
	Broker D	N/A
	Broker E	N/A
	contemi-testing	Root organization

For any tenant, there is only one root (parent) organization which is automatically created when the tenant is created, the name cannot be changed.

The "Create" function creates child organizations.



A user can be attached to several organizations. They can also be removed from the organizations later on.



Parent-organization users can manage data at the tenant scope while child-organization users can only manage data at their organization scope.

<u>Example</u>:

At Contemi-Testing tenant, the root organization is named “Contemi-Testing”, and there’re child organizations, “Broker-A” and “Broker-B”.

Contemi-Testing users can manage all accounts, quotes and policies in the tenant.

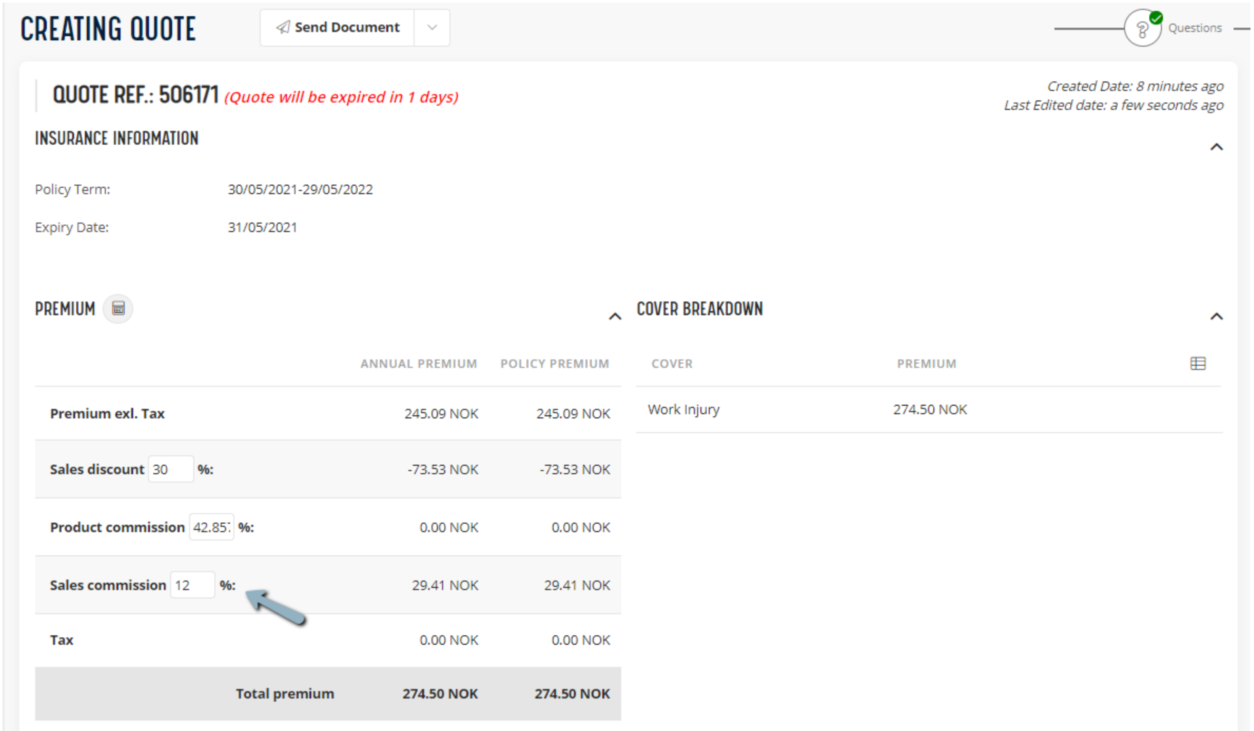
Broker-A users can only manage those with the organization of “Broker-A”.

Broker-B users can only manage those with the organization of “Broker-B”.

As for **commissions**, there’re three levels of setting:

- **Root Organization**
- **Individual Child Organization**
- **Product**

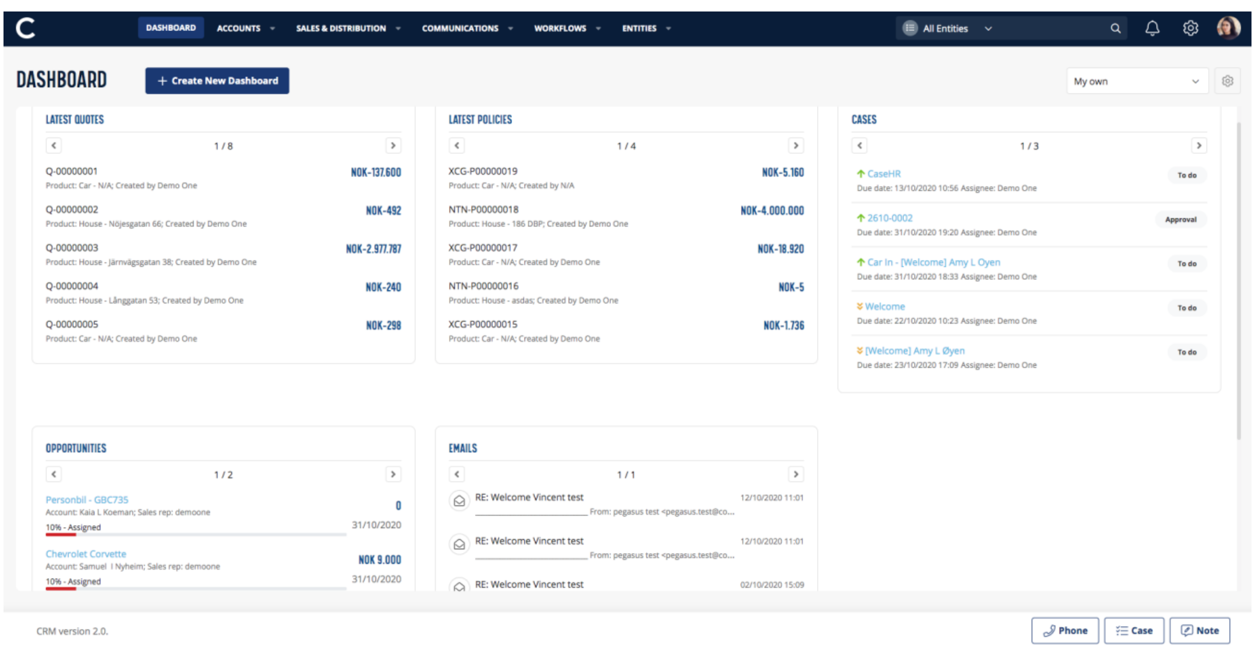
The setting is reflected during quotation process:



If the organization-level commission setting is enabled, it supersedes the product-level one.

2.3 Dashboard

SCREENSHOT



MAIN FUNCTION

This is the first landing page that users can see after logging in. It shows the widgets providing quick information that a user needs for his daily tasks. The widgets are configurable.

HOW TO FIND

After logging in, users are navigated to the Dashboard page.

In addition, users can click on the company logo or "Dashboard" button at the top left corner of the screen.

HOW TO CREATE A DASHBOARD

1. Click on the Setting icon on the right side of the dashboard page
2. Drag the layout from Configuration popup and drop to the Summary page.

   There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

   Ex: If you select 6:6 layout for a row, 2 widgets can be added.

   If you select 4:4:4 layouts, 3 widgets can be added.

3. Drag the widget from Configuration popup and drop in the layout.
4. Click **Save** on Configuration popup.

2.4 Accounts

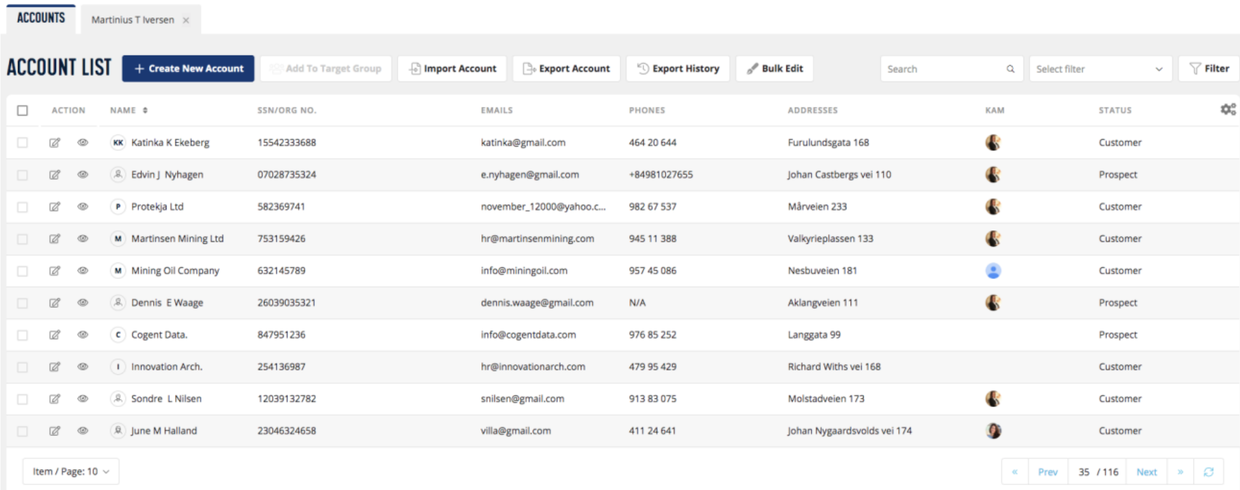
2.4.1 Accounts

MAIN FUNCTION

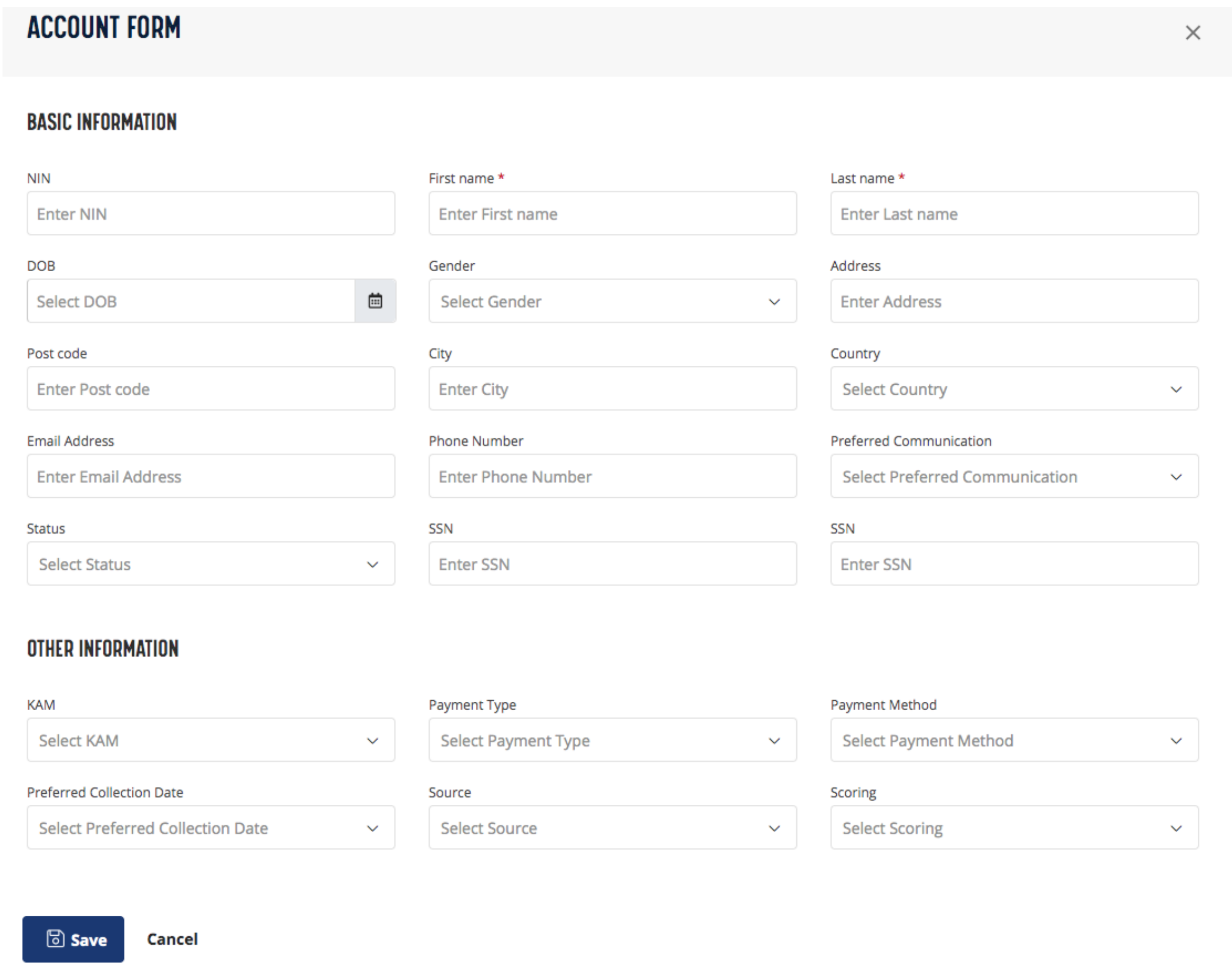
Use accounts to store information about customers who you do business with. There are two types of accounts: Company and Person.

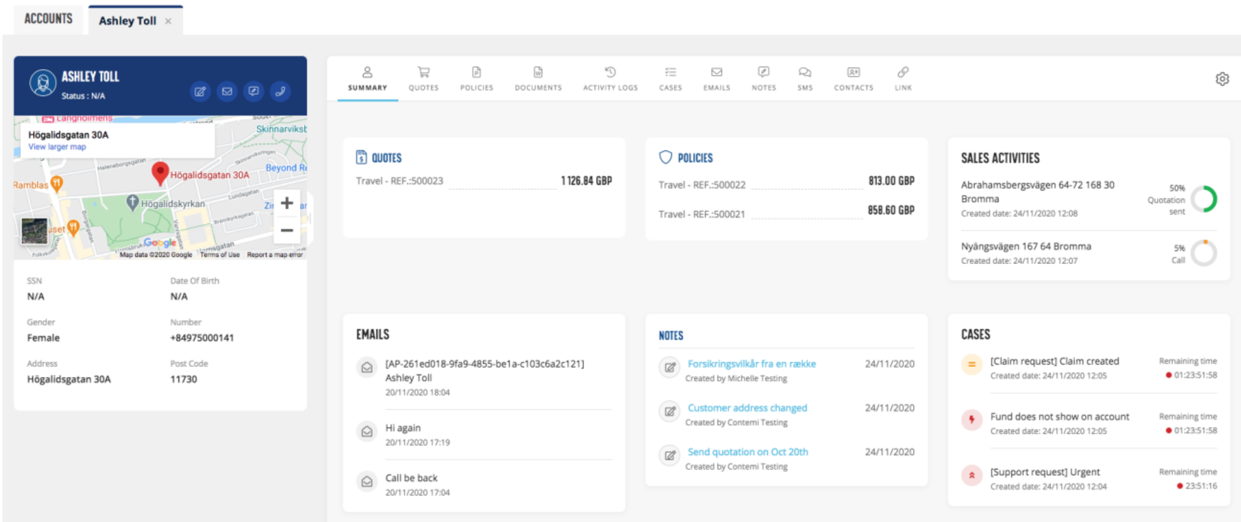
Company accounts store information about companies. Person accounts store information about individual people.

SCREENSHOT



ACTION	NAME	SSN/ORG NO.	EMAILS	PHONES	ADDRESSES	KAM	STATUS
	Katinka K Ekeberg	15542333688	katinka@gmail.com	464 20 644	Furulundsgata 168		Customer
	Edvin J Nyhagen	07028735324	e.nyhagen@gmail.com	+84981027655	Johan Castbergs vei 110		Prospect
	Protekja Ltd	582369741	november_12000@yahoo.c...	982 67 537	Mårveien 233		Customer
	Martinsen Mining Ltd	753159426	hr@martinsenmining.com	945 11 388	Valkyrieplassen 133		Customer
	Mining Oil Company	632145789	info@miningoil.com	957 45 086	Nesbuveien 181		Customer
	Dennis E Waage	26039035321	dennis.waage@gmail.com	N/A	Aklangveien 111		Prospect
	Cogent Data.	847951236	info@cogentdata.com	976 85 252	Langgata 99		Prospect
	Innovation Arch.	254136987	hr@innovationarch.com	479 95 429	Richard Withs vei 168		Customer
	Sondre L Nilsen	12039132782	snilsen@gmail.com	913 83 075	Molstadveien 173		Customer
	June M Halland	23046324658	villa@gmail.com	411 24 641	Johan Nygaardsvolds vei 174		Customer





HOW TO FIND

- Enter the URL for the system into the browser and log in
- Click on Menu Accounts and select submenu Accounts.

DESCRIPTION

❖ **HOW TO CREATE AN ACCOUNT**

1. Navigate to Accounts menu > Accounts
2. Click **+ CREATE** button on Account list
3. Select account type: Person or Company
4. Fill data into below fields (at least required field) to create an account

4.1 Person account:

Organization:

The users who are using the system can belong to a parent organization or child organization.

The user in the parent organization can create and view accounts for the parent organization or child organization. Default should be the parent organization. However, the user can select other child organizations.

The user in the child organization can create and view accounts of that child organization. If the user belongs to a child organization, the user cannot see the organization field in Create/Edit account form.

Basic information

- **NIN:** this is optional and unique for all accounts.
- **First name**: this is a mandatory field
- **Last name**: this is a mandatory field

- **DOB**
- **Gender**
- **Address**
- **Post code**
- **City**
- **Country**
- **Email address**
- **Phone number**
- **Preferred Communication**
- **Status**

Other information: data in this section is optional

- **KAM**
- **Payment type**
- **Payment method**
- **Preferred Collection Date**
- **Source**
- **Scoring**

Contact: data in this section is optional

4.2 Company account:

Organization:

The users who are using the system can belong to a parent organization or child organization.

The user in the parent organization can create and view accounts for the parent organization or child organization. Default should be the parent organization. However, the user can select other child organizations.

The user in the child organization can create and view accounts of that child organization. If the user belongs to a child organization, the user cannot see the organization field in Create/Edit account form.

Basic information

- **Org no.:** this is optional and unique for all accounts.
- **Company Name**: this is a mandatory field
- **Email address**
- **Company Phone**
- **Status**
- **Country**

Address:

- **Visiting address**
- **Extra address**
- **Post code**

- **City**
- **Postal address**
- **Extra address**
- **Post code**
- **City**
- **Invoice address**
- **Extra address**
- **Post code**
- **City**

Other information: data in this section is optional

- **Credit rating**
- **Industry**
- **KAM**
- **Payment type**
- **Payment method**
- **Preferred Collection Date**
- **Source**
- **Scoring**

Contact: data in this section is optional

❖ CREATE AN ACCOUNT WITH ORGANIZATION

The users who are using the system can belong to a parent organization or child organization.

The user in the parent organization can create and view accounts for the parent organization or child organization.

The user in the child organization can create and view accounts of that child organization.

❖ HOW TO EDIT AN ACCOUNT

Edit an account on Account list

1. Navigate to **Accounts** menu > **Accounts** submenu
2. On the Account list, click the Edit button on the Action column. Edit Account popup will open.
3. Edit information on Accounts fields. All fields in Account are editable.
4. Click **Save**

Edit an account on summary page

1. Navigate to Accounts menu > Accounts submenu
2. Click on one of the Account name to open Account summary page
3. Click button. Edit Account popup will open.
4. Edit information on Accounts fields. All fields in Account are editable.
5. Click **Save**

HOW TO IMPORT ACCOUNTS

1. Navigate to **Accounts** menu > **Accounts** submenu
2. Click on **Import Accounts** button on Account list
3. Drag and drop Account file into Import section.
4. Click **Next**
5. On the Select mapping tab: **map fields** from Import file to the current fields of the system.
6. Click Next to Preview page
7. Click Save

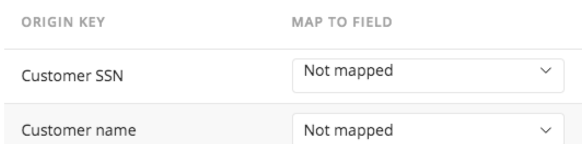
The mapping action here is to define the data in Imported file should fill into which fields of the system.

To map data, use data in “MAP TO FIELD” field.

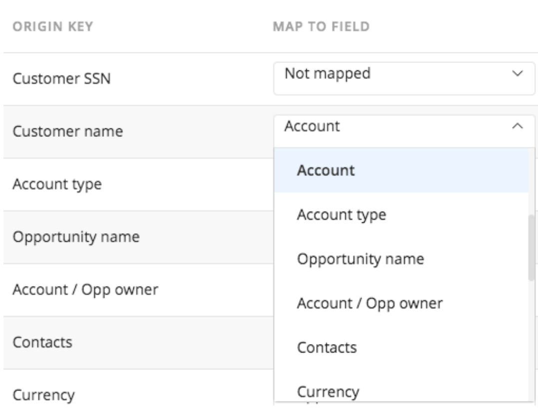
There are 2 options on Map To Field field: Not Mapped and Mapped

Not Mapped: the data on this column will not be imported into the system.

Ex: The user imported a file which has 2 fields “Customer SSN” and “Customer”. The system does not recognize these two fields so it shows “Not mapped” .



If you want to map Customer name and Account field (in the system), select “Account” on Map to field.



Mapped: the data on this column will be filled in a predefined field in the system.

- ❖ **HOW TO EXPORT ACCOUNTS**

1. Navigate to **Accounts** menu > **Accounts** submenu

2. On the Account list, select the Accounts which you want to export by ticking on the checkbox on the left side of the Account. Or ticking on the checkbox on the top to select all Accounts on that page.
3. Click Export Account button on Account list.
4. Click Export History button on Account list. This is where you can see all exported files.
5. Click on the name of the file to download the exported file.

❖ HOW TO SEARCH ACCOUNTS

1. Navigate to Accounts menu > Accounts submenu
2. Click on the button Filter on Account list. Filter panel will open on the right hand side.
3. Input search data into the search criteria.
4. Click the Filter button at the bottom of the Filter panel.

❖ HOW TO CREATE A FILTER

1. Click on the button **Filter** on Account list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Save** button at the bottom of the Filter panel. Create Filter popup will open.
4. Enter a Name for the filter.
5. Select Filter type: there are two types of filter: Global Filter and Private Filter

   Global filter: all users in the system can see and use this filter.

   Private filter: only the creator of the filter can see and use this filter.
6. Click **Save**

You can select created Filters by clicking on the Filter field on the Lead list.

❖ HOW TO CREATE A NOTE FOR AN ACCOUNT

1. Click on an Account name on the Account list.
2. Click on the Create note button to open the Create note popup.
3. Input data into below fields:
   - Title
   - Description
   - Related records: shows a list of records that are related to the note. The note created here should have the current account as the default related records.

You can add more related records. Ex: if you add an account to the related record list, the note can be found on that Account summary.

❖ HOW TO MAKE A CALL

1. Click on an Account name on the Account list
2. Click on the Make a call button
3. Select the phone number.

❖ HOW TO CREATE A CASE

1. Click on an Account name on the Account list
2. Click on Create case button to open Create case form.
3. Input data and click Save

❖ HOW TO SEND AN EMAIL

1. Click on an Account name on the Account list
2. Click on button. Compose email popup will open.
3. Fill out data into the form and click **Send**.

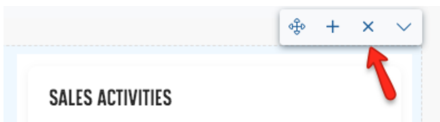
❖ HOW TO UPLOAD DOCUMENTS

1. Click on an Account name on Account list
2. Open Document tab
3. Click **Upload Document** button
4. Enter **Name** of the document
5. Drag the document into the Uploading box
6. Click Save

❖ HOW TO CONFIGURE ACCOUNT SUMMARY LAYOUT

The layout of Account summary can be changed for your demand by following below steps:

1. Navigate to the Account summary page.
2. Click on the Setting icon on the right side of the page
3. To delete a widget, hover the cursor over the widget that you want to delete and click the X button.



4. Click Save on Configuration popup.
5. To change the layout of the page, hover the cursor over the widget row and click X button to remove all the widgets.
6. Drag the layout from the Configuration popup and drop to the Summary page.

   There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

   Ex: If you select a 6:6 layout for a row, 2 widgets can be added.

   If you select 4:4:4 layouts, 3 widgets can be added.

7. Drag the widget from the Configuration popup and drop in the layout.
8. Click **Save** on Configuration popup.

❖ HOW TO ADD RELATIONSHIPS BETWEEN THE ACCOUNTS

There is a relationship between two accounts. These can be parents - children, partner, siblings… on private line customers or Parent company - Child company on commercial line customers.

In order to add relationship between two accounts:

1. Open create or edit account form and scroll down to the bottom of the form
2. On RELATIONSHIP section, click on + button
3. Search and select an account and add the relationship

For commercial lines, the relationships can be Parent/Child. Only allow you to select a commercial line account when searching for an account to add relationship. If an account (1) is a child of another account (2), account (2) will be the parent company of account (1) automatically.

For private lines, the relationships can be parent/child/partner/sibling.

Only allow you to select a private line account when searching for an account to add relationship. If an account (1) is a parent of another account (2), account (2) will be the child of account (1) automatically. Same for below cases:

Parent - Child

Child - Parent

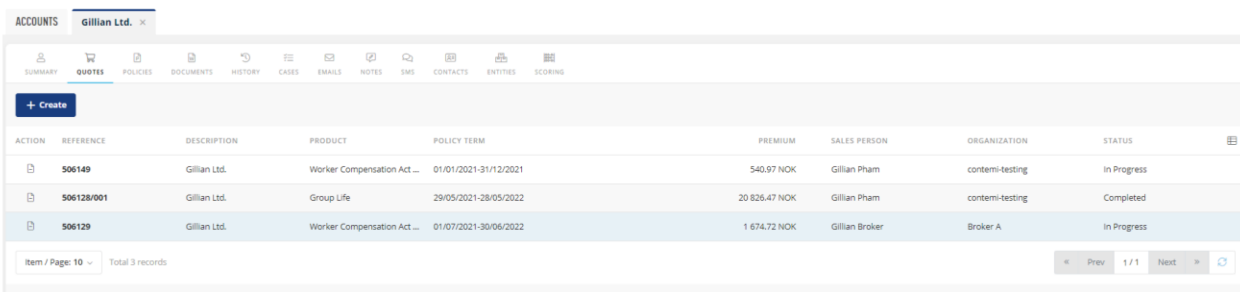
Partner - Partner

Sibling - Sibling

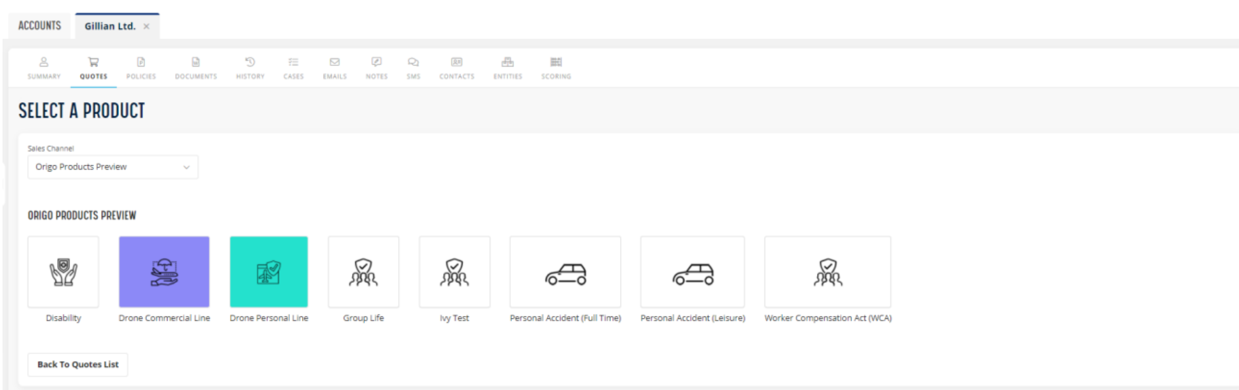
2.4.2.1 Quotes

HOW TO CREATE (IMPERSONATING) QUOTE

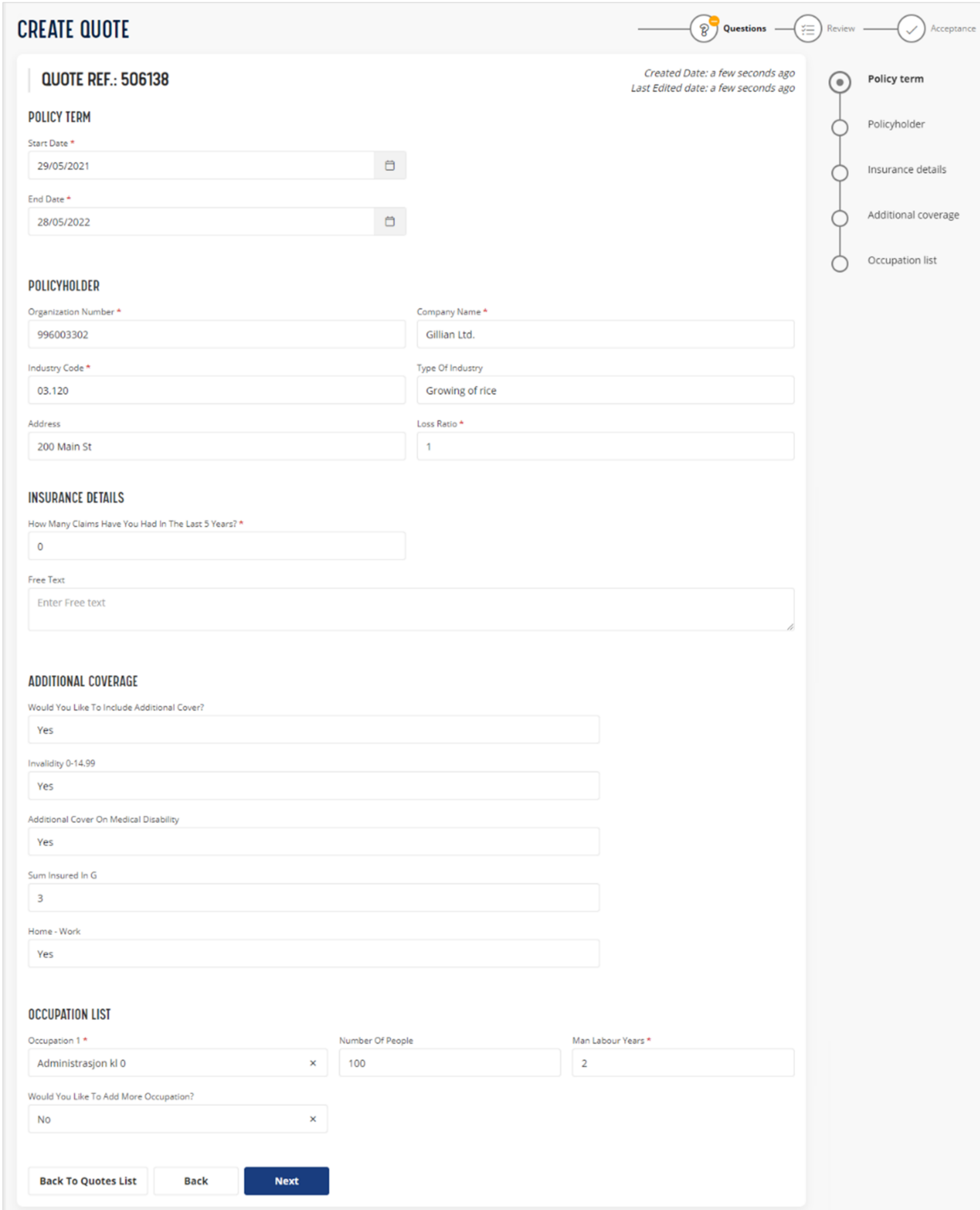
1. Open an Account
2. Navigate to Quotes tab



3. Click Create button
4. [Optional] Select Sales Channel to filter products by channel
5. Select a Product

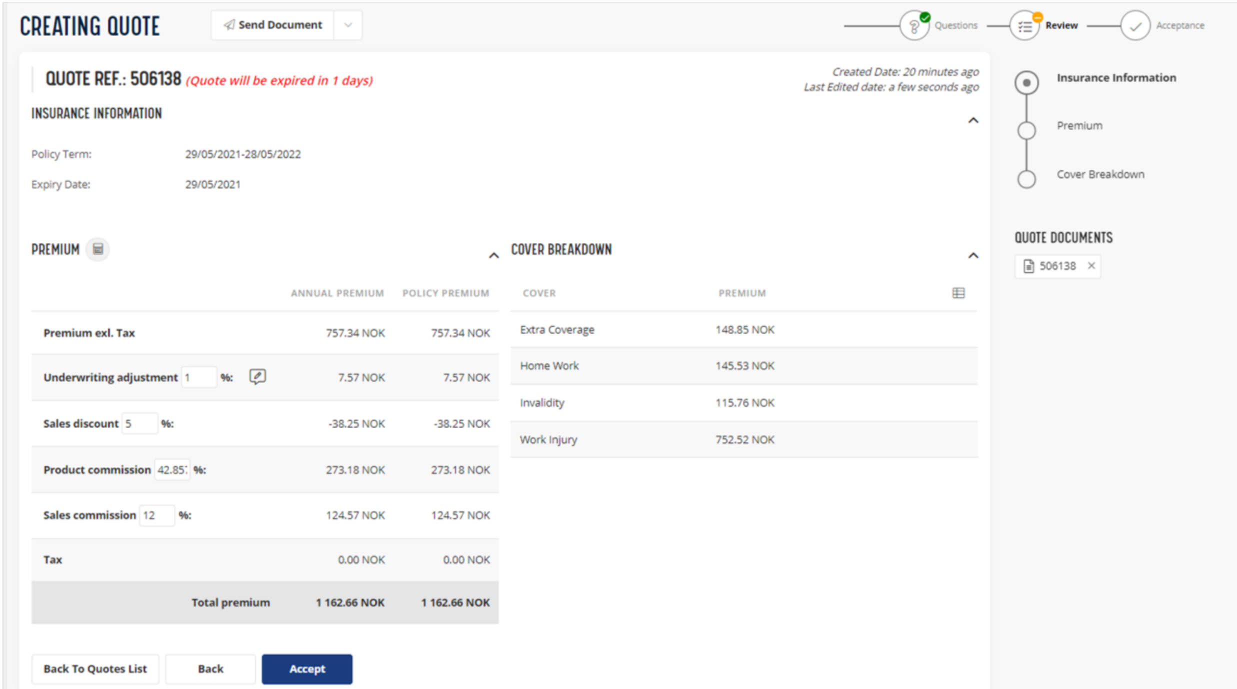


6. Fill up Q&As form



The Next button is only enabled when all the mandatory fields are filled up with valid data.

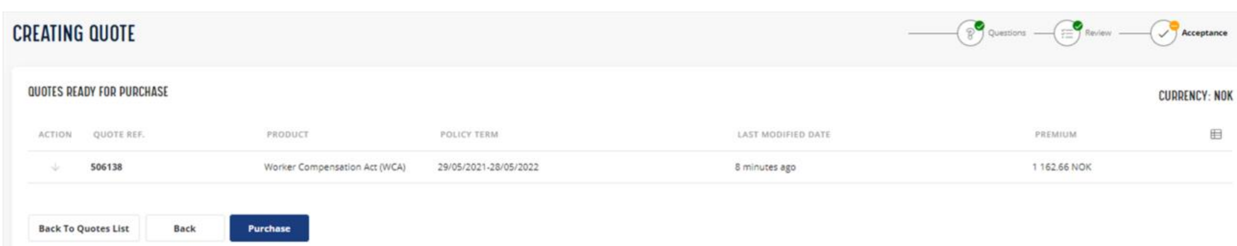
7. Click Next button to proceed to Quote Review page where it shows Premium and Cover breakdown.



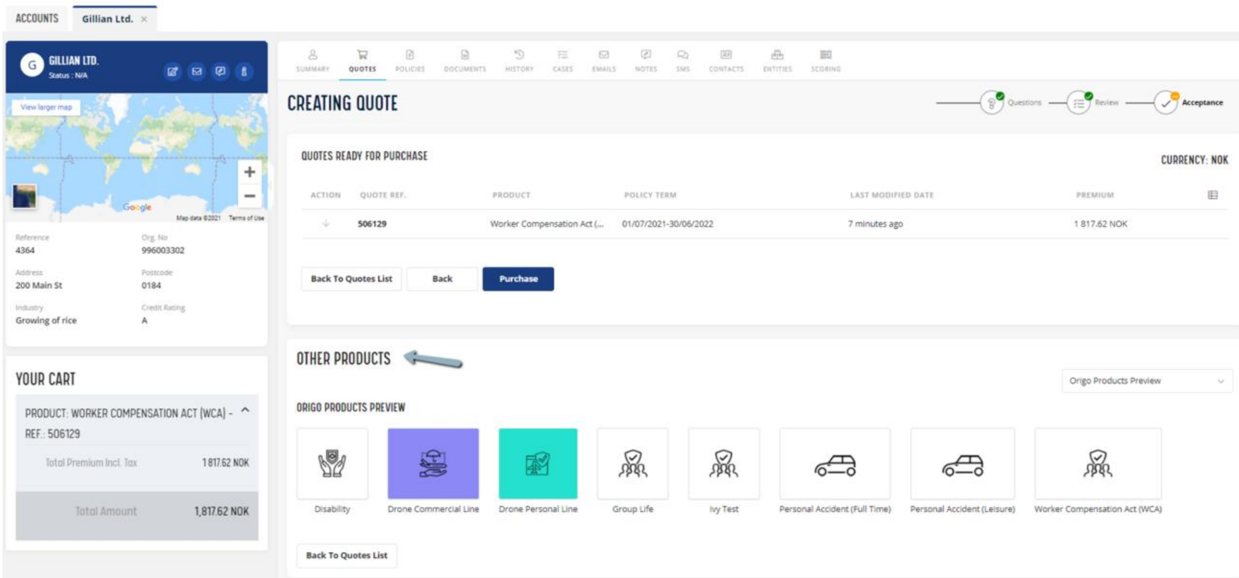
8. [Optional] Users with appropriate permission can adjust the percentages at:
    a. Underwriting adjustment
    b. Sales discount
    c. Product commission
    d. Sales commission

Then hit the  icon to get the premiums re-calculated.

9. [Optional] Back button navigates user back to the Q&As form
   Back To Quotes List button navigates user back to Quote List page
10. Click Accept button, the quote is added to Quotes Ready For Purchase cart



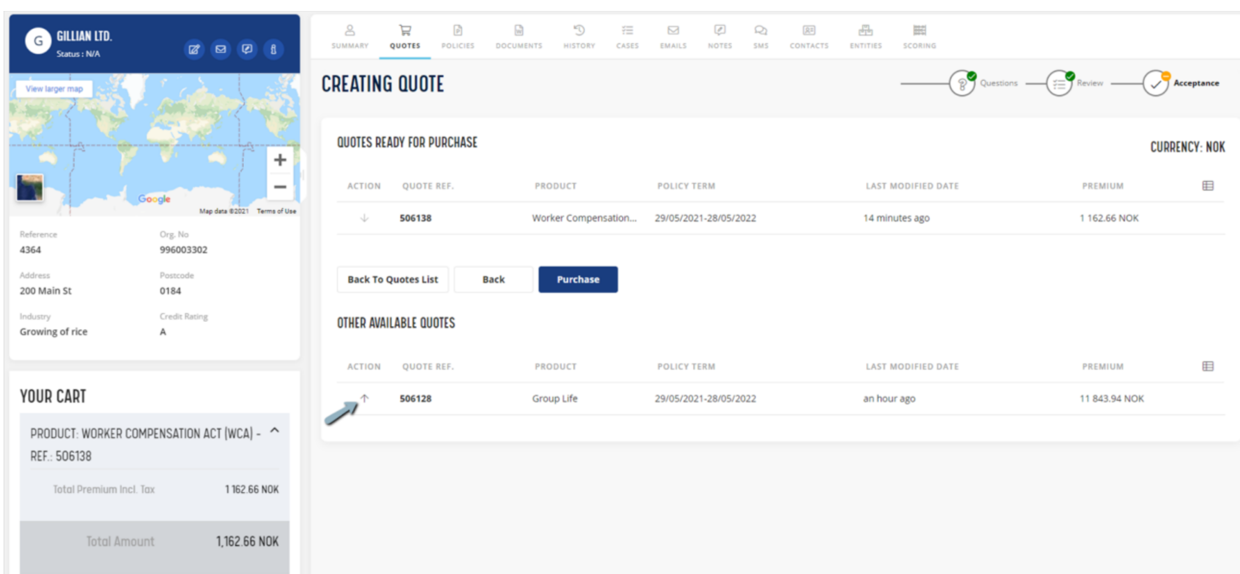
After accepting a quote, users can create another one without having to get back to Quote List page. Other Products section provides quicker access to Q&As form.



HOW TO PURCHASE QUOTE

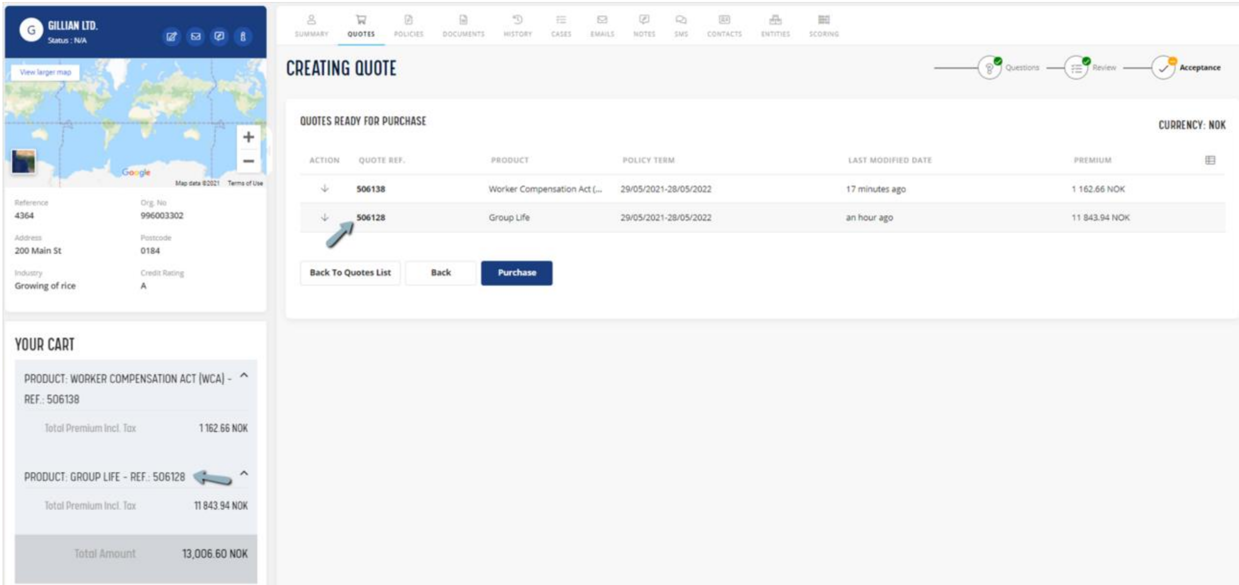
Users can purchase more than one quote at a time, as long as the quotes are all completed and in the same currency.

1. [Optional] Click the icon to add a particular quote to Shopping cart

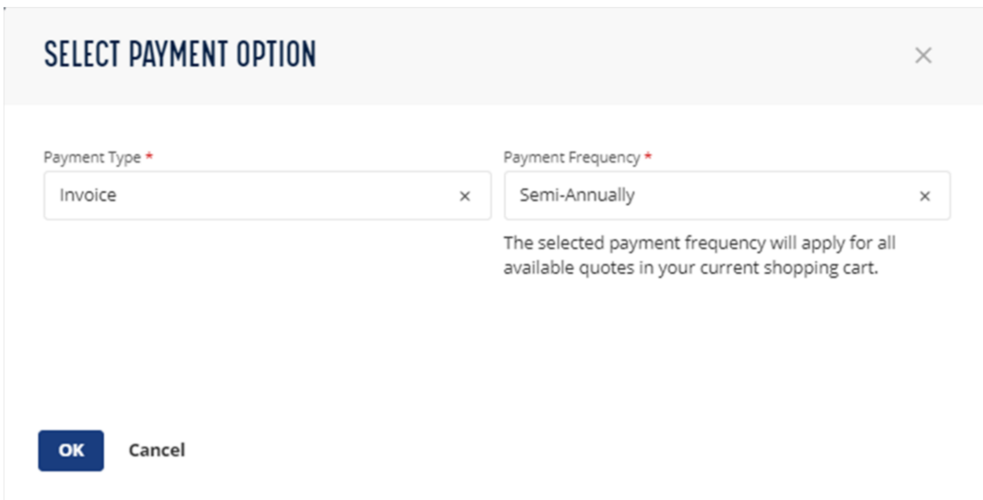


To remove quote from Shopping cart, click the icon.

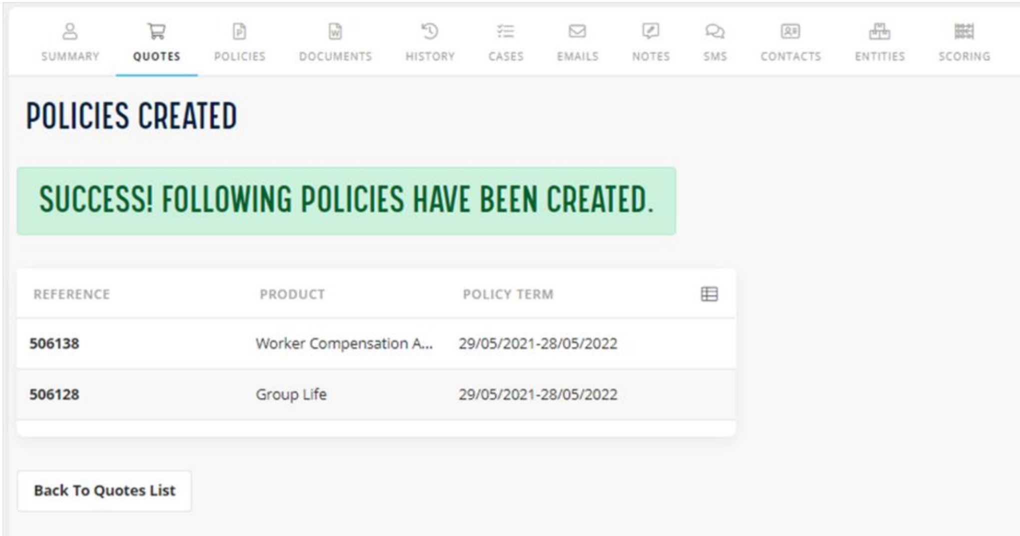
The information at Your cart section is updated



2. Click Purchase button
   Select Payment Option pops up with the account's Payment Type and Payment Frequency



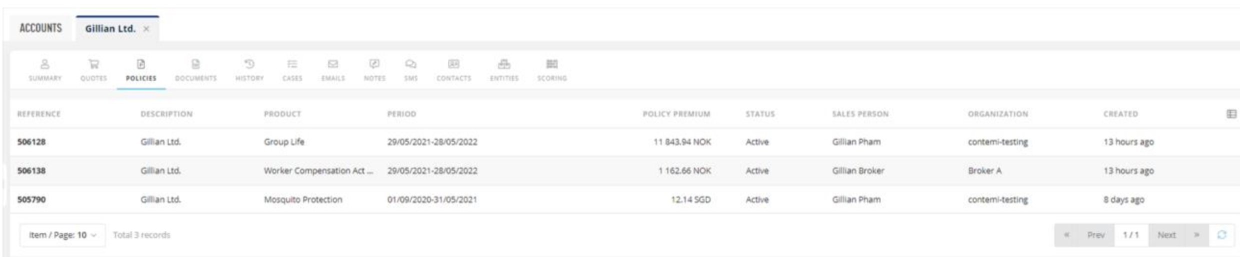
3. [Optional] Change payment option
4. Click OK.
   The quotes are purchased and it shows hyperlinks to policy details page.



2.4.2.2 Policies

HOW TO FIND POLICY

1. Open an Account
2. Navigate to Policies tab

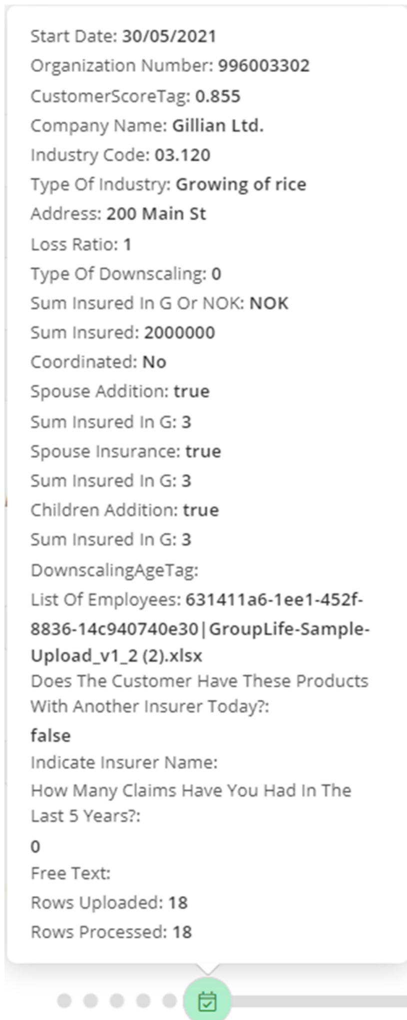


It shows all columns by default, users can remove/re-add column(s).

3. Click Policy Reference hyperlink to open Policy Details page

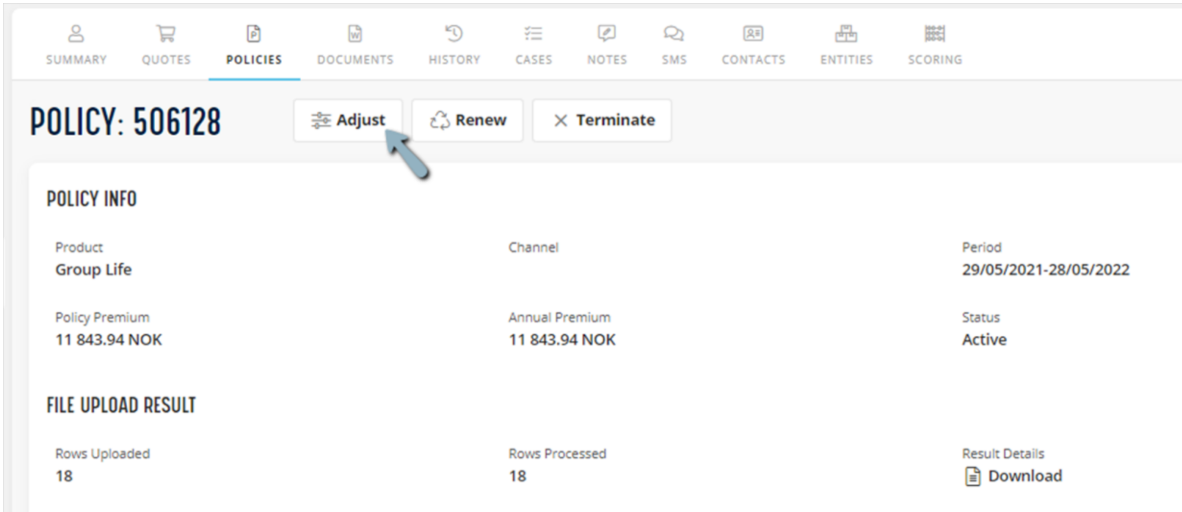
HOW TO REVIEW RISK ANSWERS

1. Open Policy Details page
2. Scroll down to Policy Timeline section, locate and click on the icon >> Risk Answers pops up



HOW TO DO MID-TERM-ADJUSTMENT (MTA)

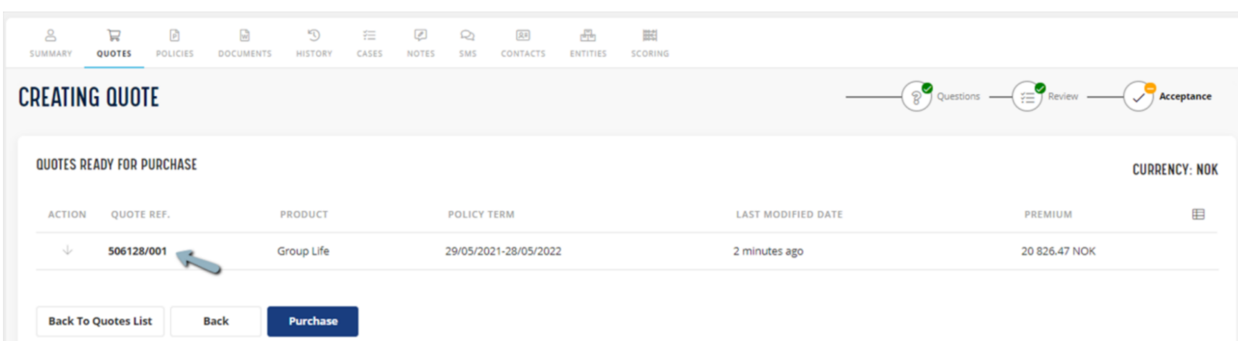
1. Click the Adjust button >> Q&As form is open



2. Select MTA Effective Date *([tomorrow] by default)*
   Edit answers at Q&As
3. Click Next button >> navigated to Quote Review page with new premiums
4. [Optional] Users with appropriate permission can adjust the percentages at:
   - Underwriting adjustment
   - Sales discount
   - Product commission
   - Sales commission

Then hit the icon to get the premiums re-calculated.

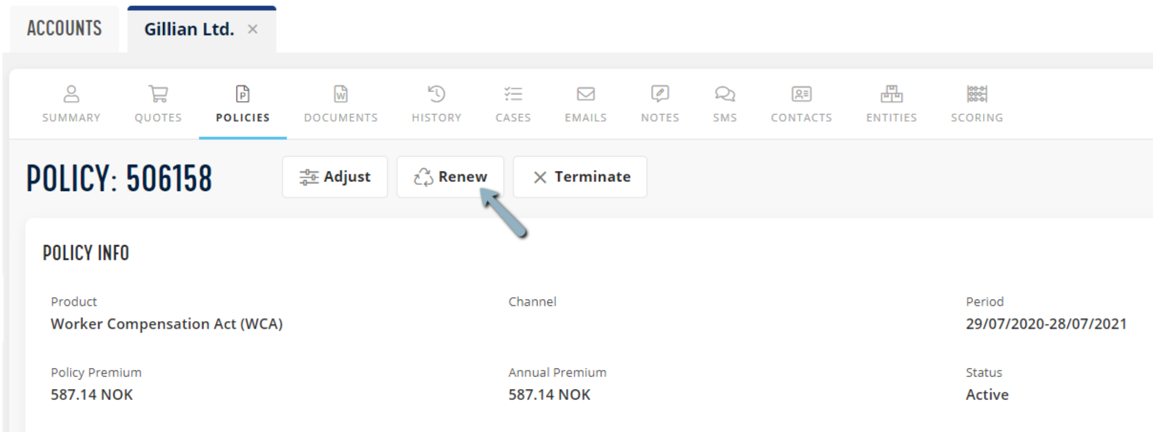
5. Click Accept button >> the quote is added to Quotes Ready For Purchase cart
   Quote Ref has a suffix of {/xxx} which is the adjustment version number.



6. Click Purchase button
7. Select Payment Option and click OK >> Policy is MTA'd

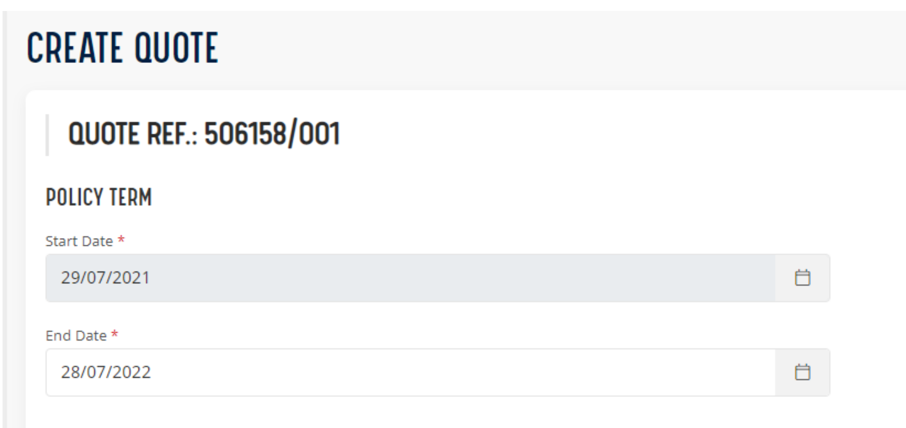
HOW TO RENEW POLICY

1. Open an active policy.
2. Locate and click on the Renew button.

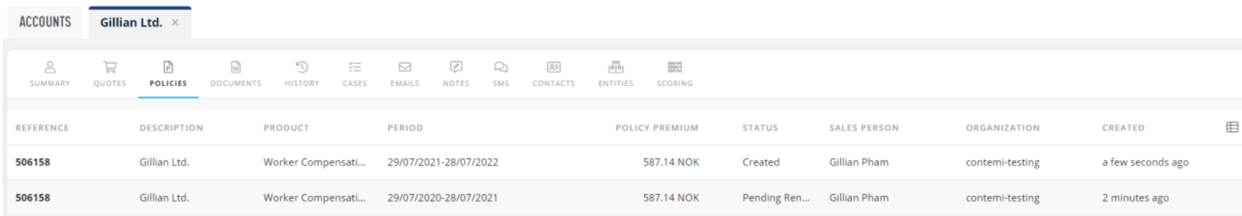


>> It opens the Renewal Q&As form, all Q&As are automatically pre-filled based on the original risk answers.

Note: Start-date is original-end-date + 1 day and cannot be changed.

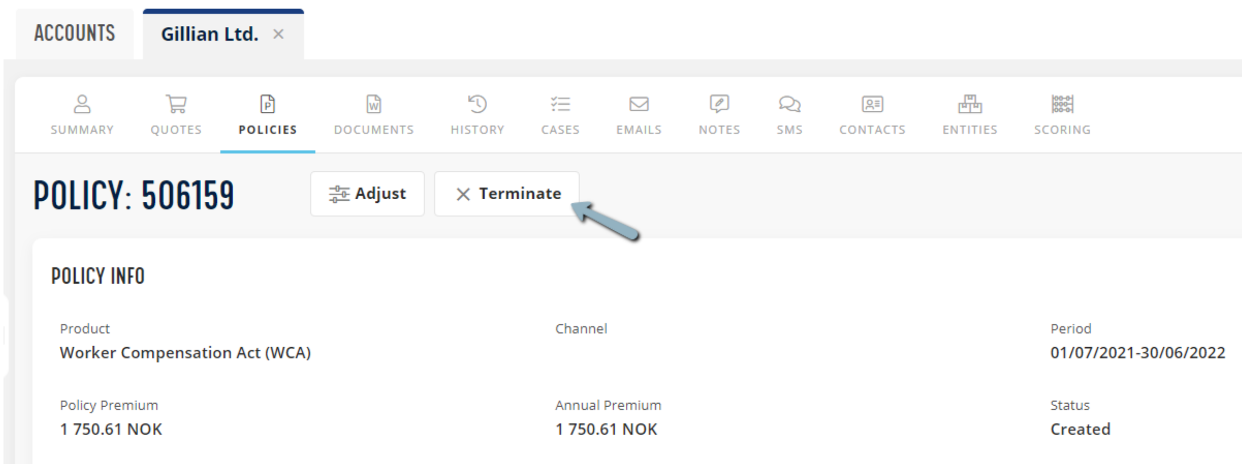


3. [Optional] Make amendment to the Q&As if needed.
4. Click Next button >> navigated to Quote Review page where it shows Premium and Cover Breakdown, and user can edit UW Adjustment, Sales Discount, Product/Sales Commissions if needed.
5. Click Accept button
6. Click Purchase button and confirm Payment Options >> Renewal Policy is created and has the same Policy Reference number as the original.

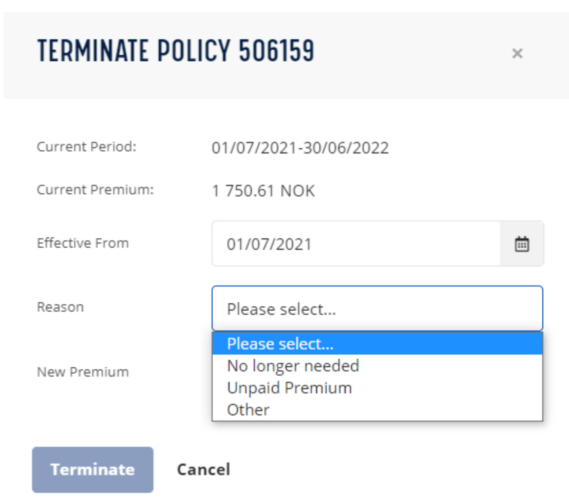


HOW TO TERMINATE POLICY

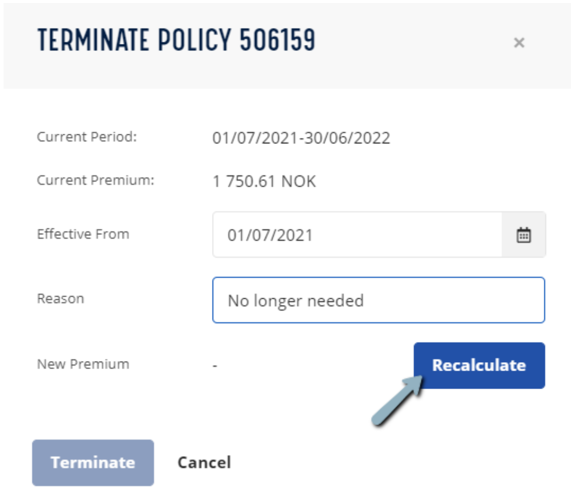
1. Open the policy that needs terminating.
2. Locate and click on the Terminate button.



3. Select Effective From date and Termination Reason



4. Click Recalculate button



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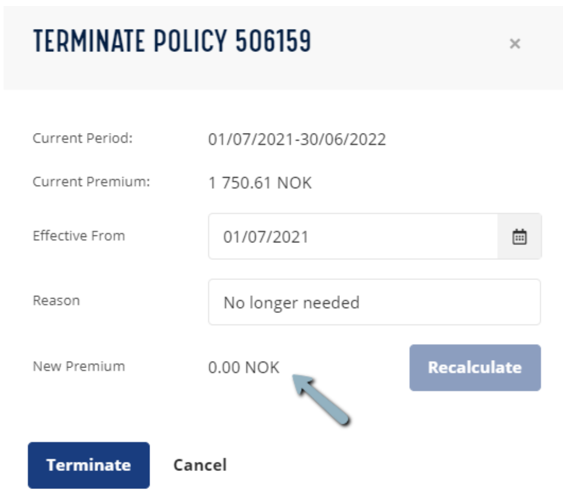
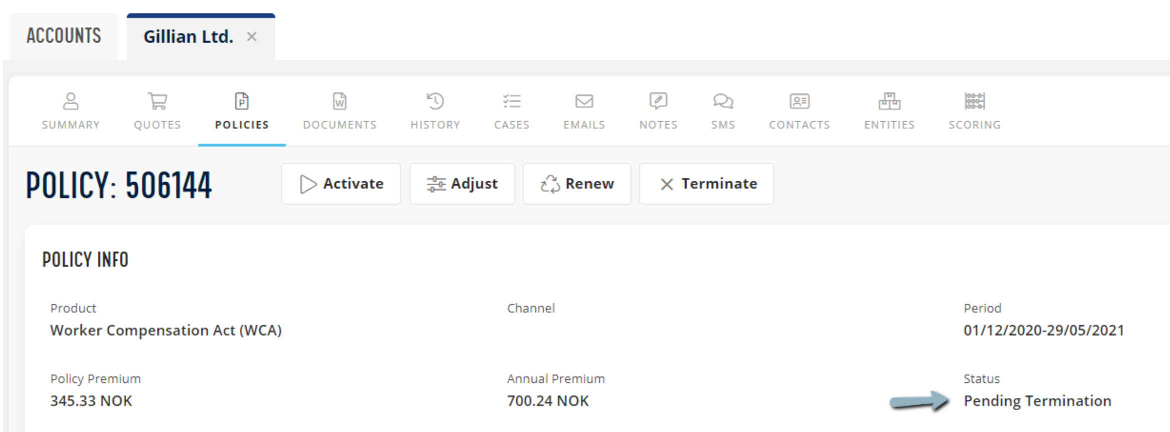
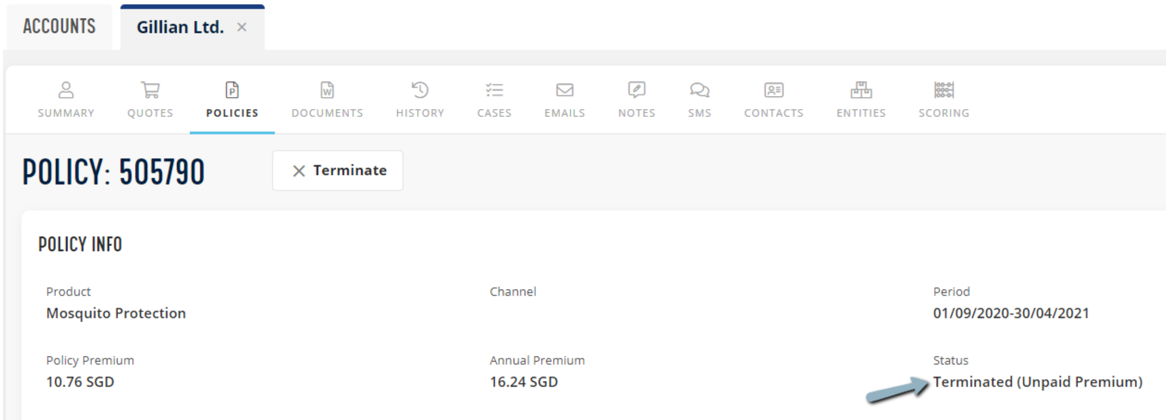


5. Click Terminate button
6. Check Policy Details page for Policy Status
    - For future Termination Effective date, it shows "Pending Termination"



    - For past Termination Effective date, it shows "Terminated"

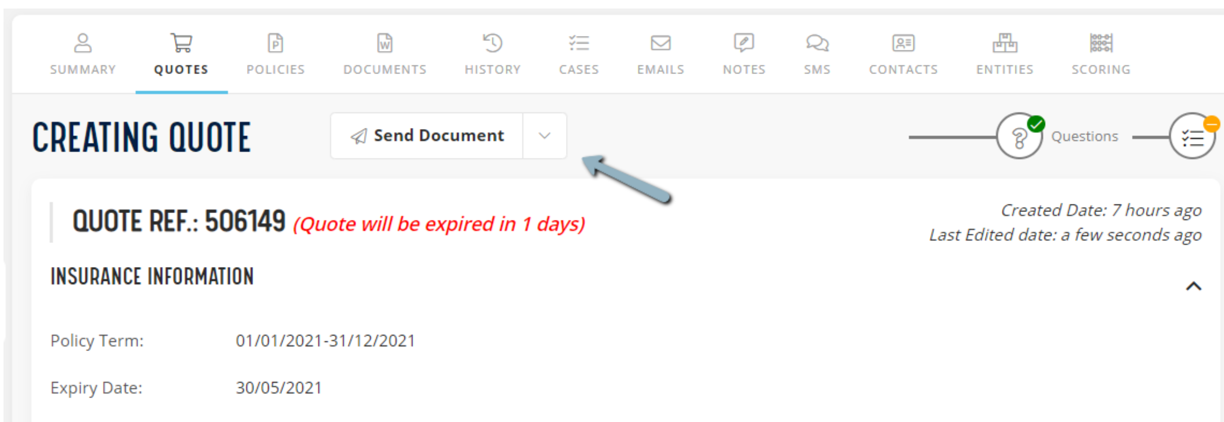


2.4.2.3 Quote and Policy Documents

HOW TO GET QUOTE DOCUMENT

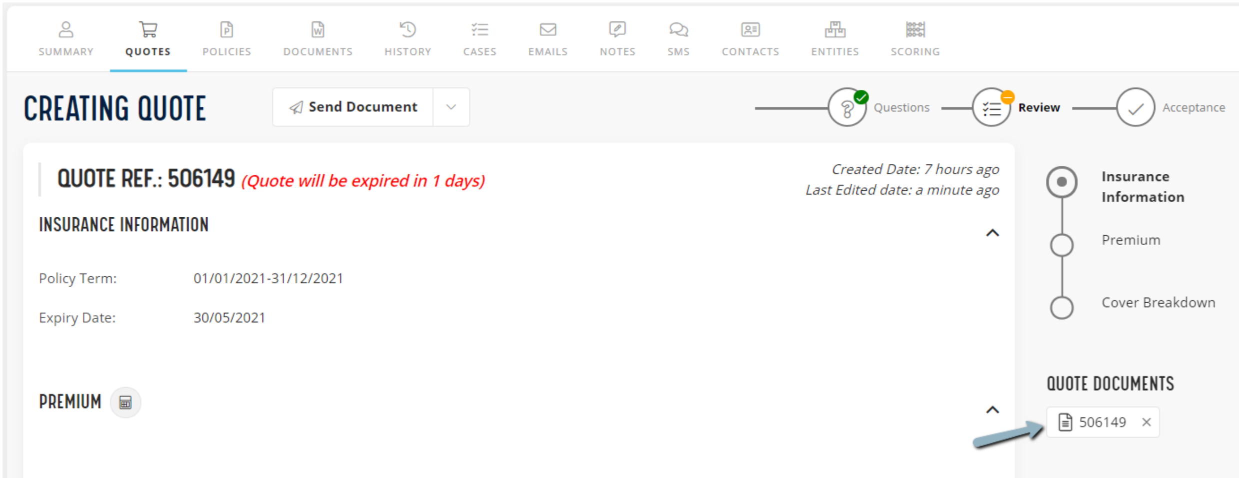
Quote documents are generated manually.

1. Open the quote.
2. Locate Send Document button group.



3. Click the arrow down button.
4. Click Generate Document button.

5. Quote Documents can be found at the right hand-side of the screen.

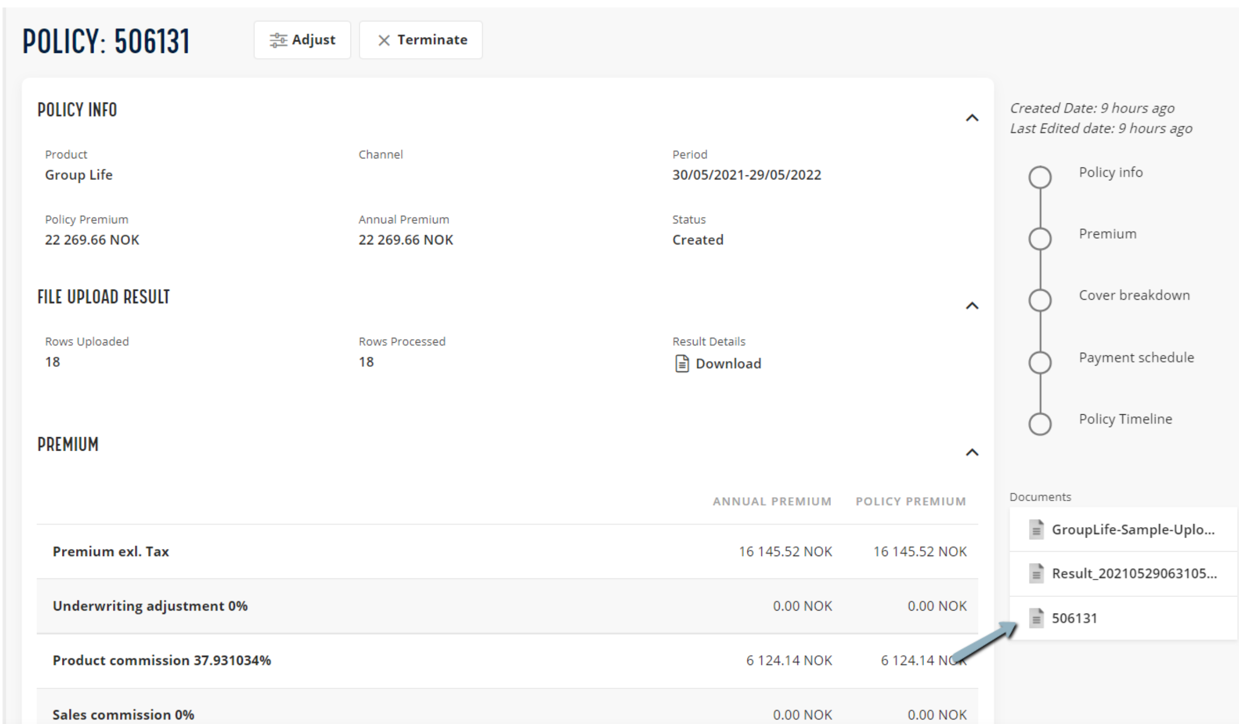


6. Click on Quote Ref button to download document.

HOW TO GET POLICY DOCUMENT

Policy documents are automatically generated after policy purchase.

1. Open the policy.
2. Locate the Documents section on the right-hand side of the screen.
3. Click on the Policy Ref hyperlink to download document.



2.5 Leads

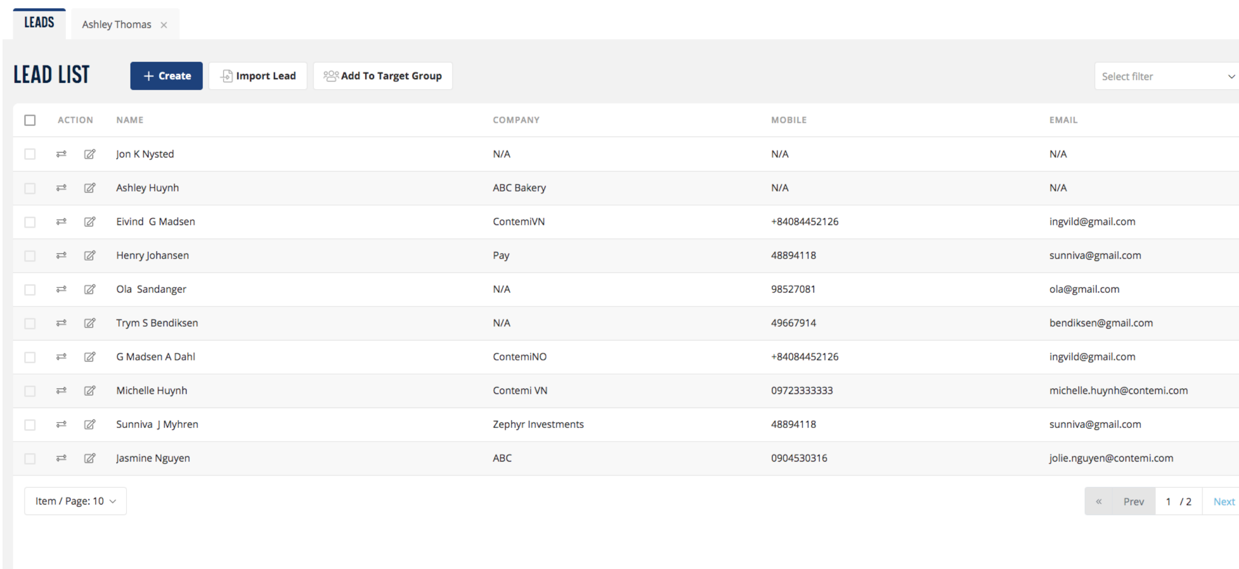
MAIN FUNCTION

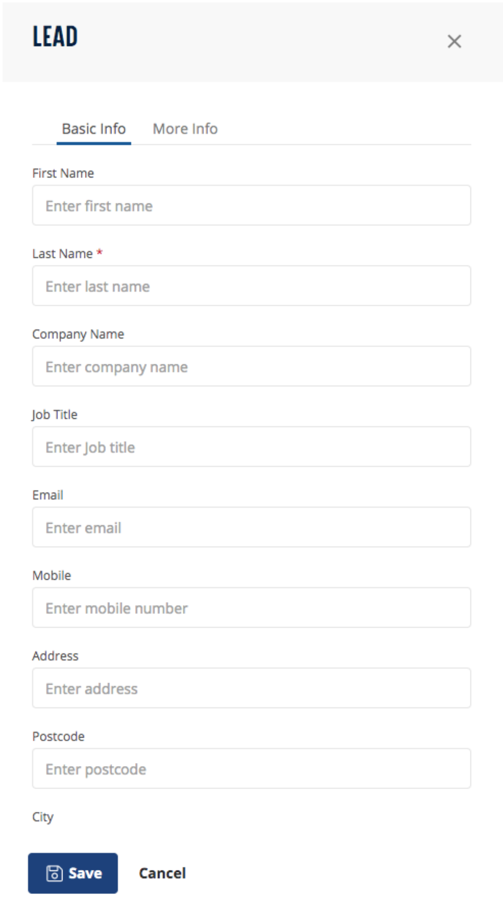
A lead is a person that is created in the system.

The lead who is interested in the products can be converted to an Account and then can start a sales process.

While converting the lead to an account, some information of the lead will be transferred to the account.

SCREENSHOT





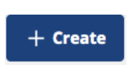
HOW TO FIND

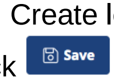
- Enter the url for the system into the browser and log in
- Click on Menu Accounts and select submenu Leads.

DESCRIPTION

On the Lead module, the user can create a new lead, import leads, convert lead to account, search lead.

- ❖ **HOW TO CREATE A LEAD**

1. Open Lead list
2. Click on Create button 

 to open Create lead form.
3. Enter information on below fields and click 

First Name

Last Name

Company Name

Job Title

Email

Mobile

Address

Postcode

City

Country

KAM

Source

Lead created will be shown on top of the Lead list.

- **HOW TO IMPORT LEADS**

1. Click on **Import Leads** button on the Lead list
2. Drag and drop Lead file into Import section.
3. Click **Next**
4. On the Select mapping tab: map fields from Import file to the current fields of the system.
5. Click **Next** to Preview page
6. Click **Save**

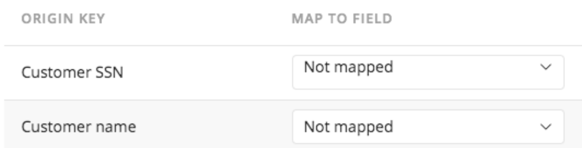
The mapping action here is to define the data in Imported file should fill into which fields of the system.

To map data, use data in “MAP TO FIELD” field.

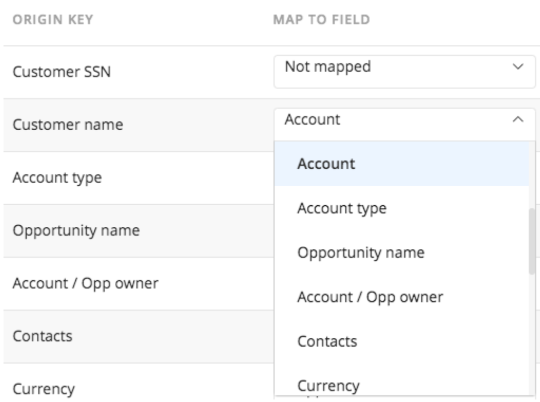
There are 2 options on Map To Field: Not Mapped and Mapped

Not Mapped: the data on this column will not be imported into the system.

Ex: The user imported a file which has 2 fields “Customer SSN” and “Customer”. The system does not recognize these two fields and it therefore shows “Not mapped”.



If you want to map Customer name and Account field (in the system), select “Account” on Map to field.



Mapped: the data on this column will be filled in a predefined field in the system.

- **HOW TO CONVERT LEAD TO AN ACCOUNT**

1. Hover over button on Lead list
2. Select to convert lead to a **Person** or **Company** account
3. Create an Account form will open. Depending on what is selected on step 2, the system opens the Account creating form for Person or Company.
4. Click **Save**

If you convert the lead to a Person account, aata of the lead will be filled out into these fields of the Account:

- First name: is the first name of the Lead
- Last name: is the last name of the Lead
- Address: is the address of the Lead
- Post Code: is the postcode of the Lead
- City: is the city of the Lead
- Country: is the country of the Lead
- Email address: is the email of of the Lead
- Phone number: is the mobile of the Lead

If you convert the lead to a Company account, aata of the lead will be filled out into these fields of the Account:

Data of the lead will be filled out into these fields of the Account:

- Company name: is Company name of the Lead
- Email address: is the email of of the Lead
- Phone number: is the mobile of the Lead
- Country: is the country of the Lead
- Visiting Address: is the address of the Lead
- Post Code (Visiting Address): is the postcode of the Lead
- City(Visiting Address): is the city of the Lead

❖ **HOW TO SEARCH LEAD**

1. Click on the button **Filter** on Lead list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Filter** button at the bottom of the Filter panel.

❖ **HOW TO CREATE A FILTER**

1. Click on the button **Filter** on Lead list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Save** button at the bottom of the Filter panel. Create Filter popup will open.
4. Enter a Name for the filter.

Select Filter type: there are two types of filter: Global Filter and Private Filter

Global filter: all users in the system can see and use this filter.

Private filter: only the creator of the filter can see and use this filter.

5. Click **Save**

You can select created Filters by clicking on the Filter field on the Lead list.

2.6 Contacts

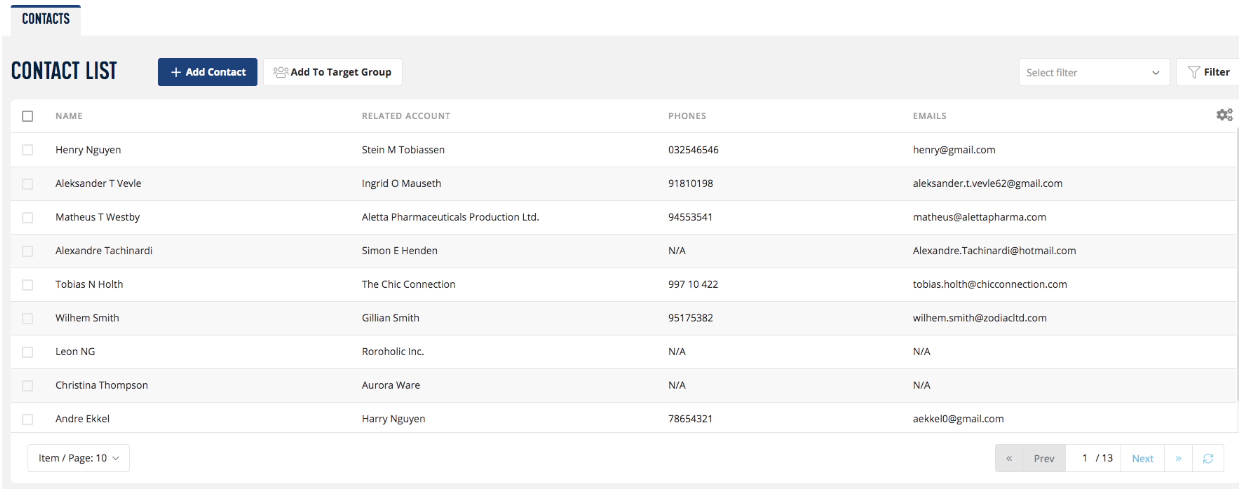
MAIN FUNCTION

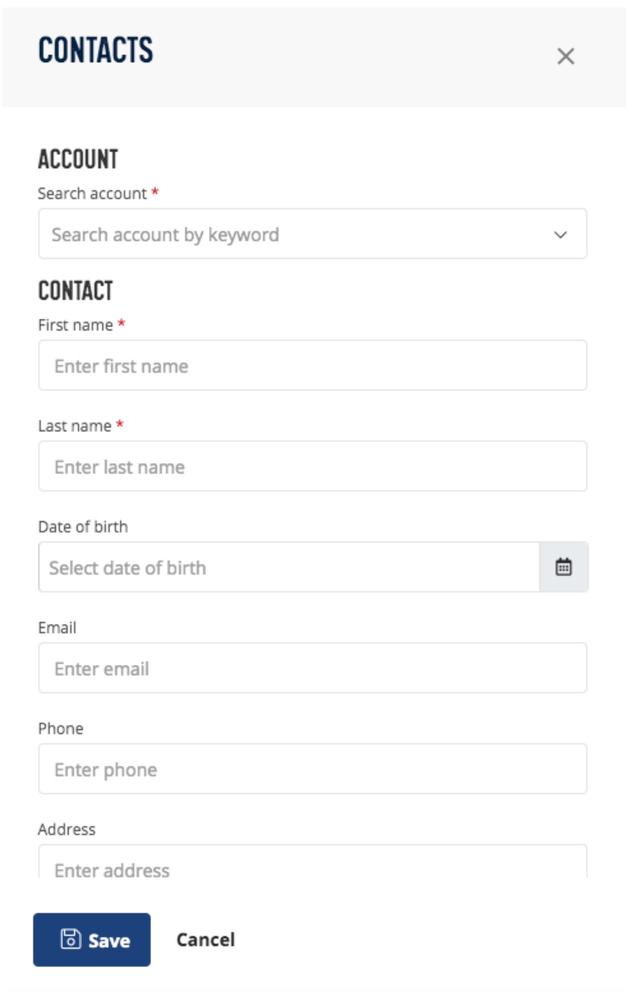
A contact is a person that is linked with an account (Person or Company)

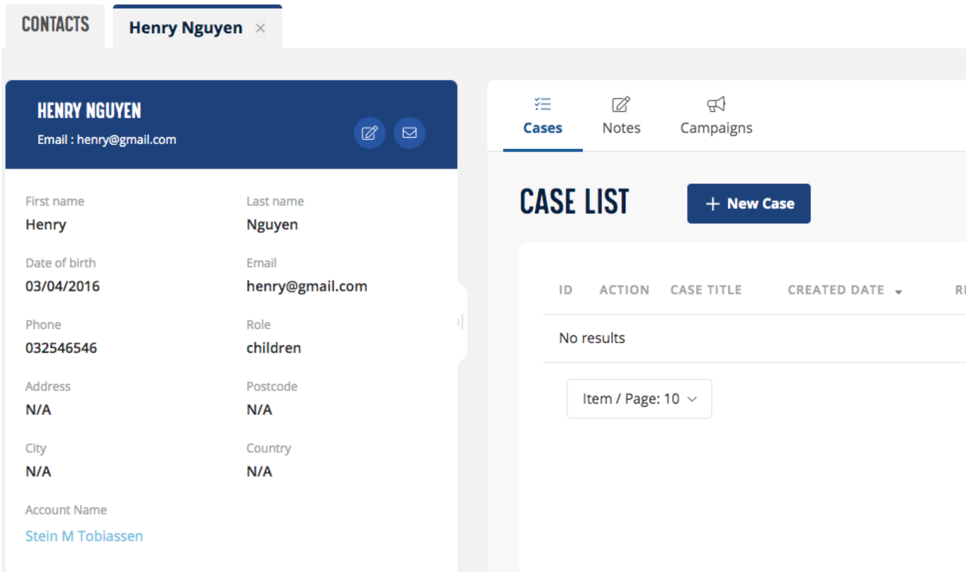
For a Person account, the contacts can be Parents, Spouse, Children, Siblings,..

For a Company account, the contacts can be Sales executive, CEO, CFO, Accountants,...

SCREENSHOT


CONTACTS
CONTACT LIST
+ Add Contact
Add To Target Group
Select filter
Filter
NAME
RELATED ACCOUNT
PHONES
EMAILS
Henry Nguyen
Stein M Tobiassen
032546546
henry@gmail.com
Aleksander T Vevle
Ingrid O Mauseth
91810198
aleksander.t.vevle62@gmail.com
Matheus T Westby
Aletta Pharmaceuticals Production Ltd.
94553541
matheus@alettapharma.com
Alexandre Tachinardi
Simon E Henden
N/A
Alexandre.Tachinardi@hotmail.com
Tobias N Holth
The Chic Connection
997 10 422
tobias.holth@chicconnection.com
Wilhem Smith
Gillian Smith
95175382
wilhem.smith@zodiacltd.com
Leon NG
Roroholic Inc.
N/A
N/A
Christina Thompson
Aurora Ware
N/A
N/A
Andre Ekkel
Harry Nguyen
78654321
aekkel0@gmail.com
Item / Page: 10
Prev
1 / 13
Next


CONTACTS
ACCOUNT
Search account *
Search account by keyword
CONTACT
First name *
Enter first name
Last name *
Enter last name
Date of birth
Select date of birth
Email
Enter email
Phone
Enter phone
Address
Enter address
Save
Cancel



HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Menu Accounts and select submenu Contacts.

DESCRIPTION

❖ **HOW TO CREATE A CONTACT**

There are 3 ways to create a contact:

- Creating the contact on Contact menu
- Creating contact when creating an Account
- Creating contact on Contact tab under an Account

\+ **Creating the contact on Contact menu**

1. Open Contact menu
2. Click **+ Create** button. Create contact popup will open.
3. Enter data into required fields.
4. Click Save.

- Accounts: A contact must belong to an Account. You can search and select the Account for the contact on Search Account field
- First name
- Last name
- Date of Birth
- Email
- Phone
- Address
- Postcode

+ **Creating the contact when creating an Account**

1. Navigate to Accounts -> Accounts. Account list will open.
2. Click **+ Create** to open Create Account form
3. Enter all required fields in Basic information section
4. Scroll down to the bottom of the form to see Contact list section
5. Click **+** button next to Contact list to open Create Contact form

6. Enter data into Create Contact form and click Save

The contact created here will be linked with the current Account.

+ **Creating contact on Contact tab under an Account**

1. Navigate to Accounts -> Accounts. Account list will open.
2. Open summary page of the Account which you want to create the Contact for.
3. Click on the Contacts tab.
4. Click on **Create contact** button to open Create contact form.
5. Enter data into Create contact form.
6. **Click Save**

❖ **HOW TO VIEW CONTACT**

1. Navigate to Accounts -> Contacts
2. Click on Contact name to open Contact details screen

❖ **HOW TO SEARCH CONTACTS**

1.Click on the button **Filter** on Contact list. Filter panel will open on the right hand side.

2. Input search data into the search criteria.

3. Click the **Filter** button at the bottom of the Filter panel.

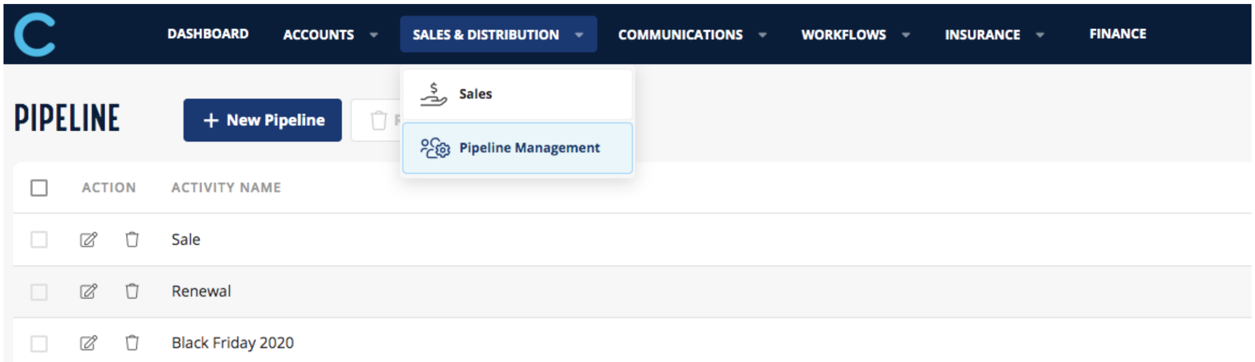
2.7 Sales & Distribution

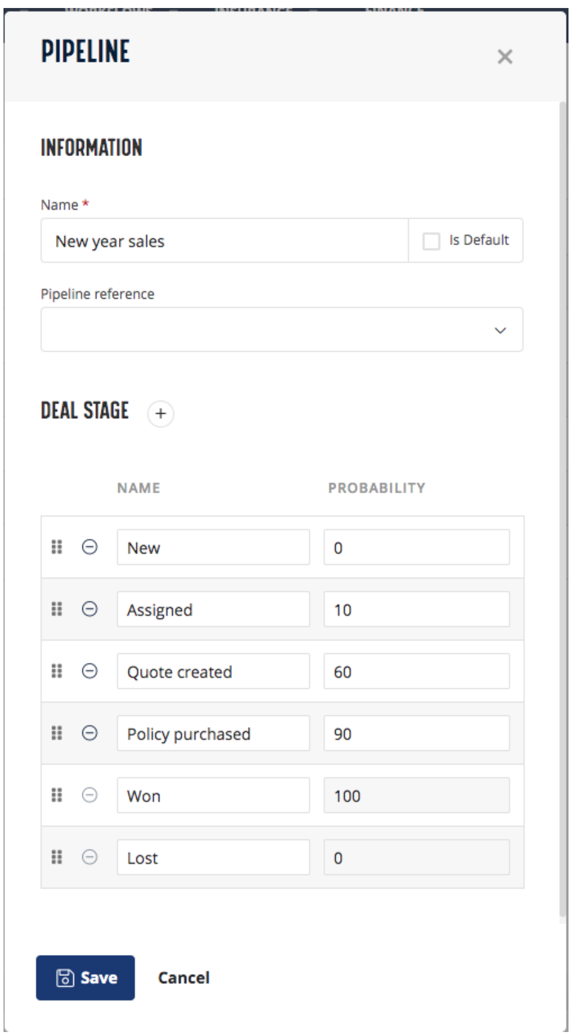
2.7.1 Pipeline Managements

MAIN FUNCTION

A sales pipeline is a set of stages that a lead/prospect moves through, as they progress from a new lead to a customer.

SCREENSHOT





HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Menu Sales and Pipeline management and select submenu Pipeline management.

DESCRIPTIONS

The user can create a new Pipeline, edit/delete existing pipelines and view pipelines when accessing the Pipeline management page.

❖ **HOW TO CREATE A NEW PIPELINE**

1. Open Pipeline management page
2. Click + New Pipeline
3. Enter information on below fields and click Save

Name: This is a mandatory field and a free text field.

There is a “Is default” checkbox on the Name field. When the “Is default” field is ticked, this pipeline becomes the default pipeline. So when the user creates a new sale, this default pipeline is chosen automatically.

Only one Pipeline can be marked as Is default at a time.

Pipeline reference:

A drop down list that the user can select a pipeline for reference. When a pipeline is selected, the stages of the selected pipeline will be displayed in the Deal stage of the current pipeline.

This is an optional field.

Deal stage:

There are two default stages: Won (100%) and Lost (0%)

These two stages are always at the bottom of the pipeline. The user can edit the name “Won” and “Lost” but cannot delete them.

The user can add more stages by clicking on this button .

When a new stage is added, name and probability fields of that stage need to be filled out.

The user can remove the stages which are added manually by clicking button . If a stage is in use, it cannot be removed.

The user can drag and drop the stages to change the order of them by hovering over button and drag it.

❖ **HOW TO EDIT A PIPELINE**

1. Click on Edit button on a Pipeline on Pipeline list.
2. Pipeline detail popup will open.
3. Edit information on Pipeline
4. Click Save

The user can edit

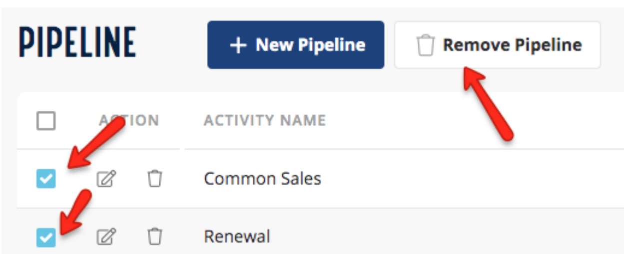
- Name of Pipeline
- Is Default. If the “Is default” checkbox is checked, the user can un-check it. Or mark a pipeline as Is default if there is no default pipeline.
- Deal stages: the user can add a new stage, edit name and probilitty of existing stages, remove existing states if the stages are not in use.

❖ **HOW TO DELETE A PIPELINE**

1. Click on Delete button 🗑 on a Pipeline on Pipeline list.
2. The system will ask if the user wants to delete the pipeline. Clicking Yes if you want to delete the pipeline. Click No if you want to cancel.

- Note: You can delete only the pipelines which have no sale attached to it.

You can delete multiple pipelines at the same time by ticking on the checkbox on the right side of each pipeline then clicking on the Remove Pipeline button.



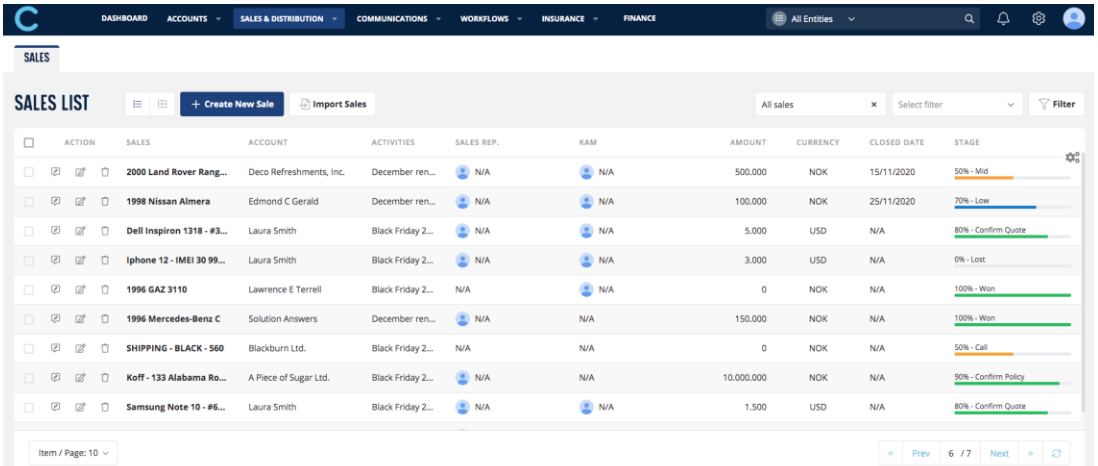
2.7.2 Sales

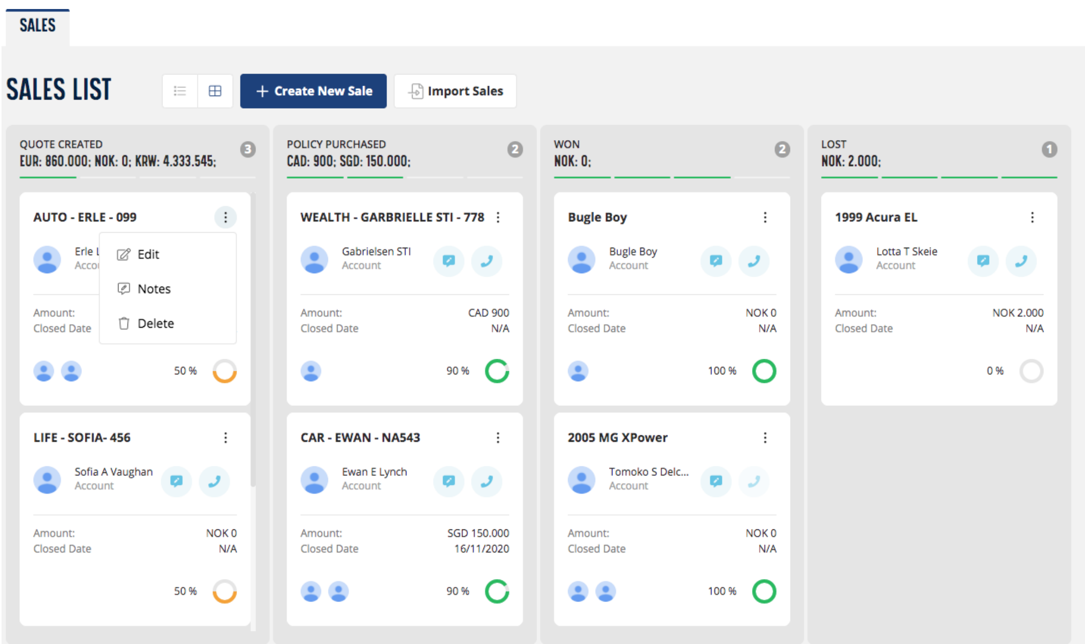
MAIN FUNCTION

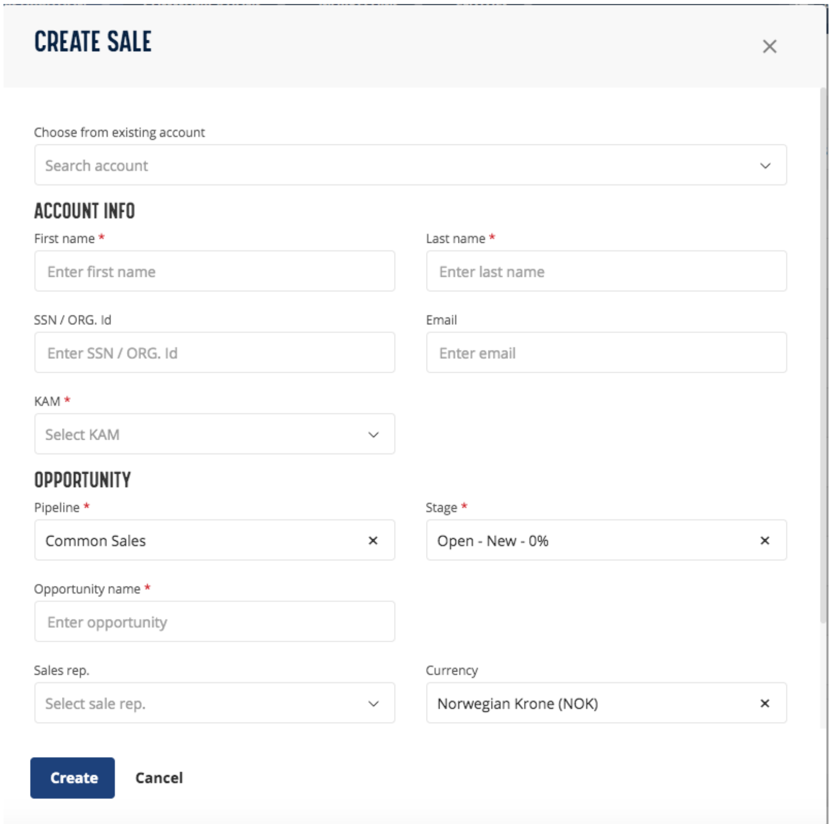
A sale or deal is a type of activity. It represents something you want to sell and has a value attached to it. The prospect is moved from one stage to another through the sales process.

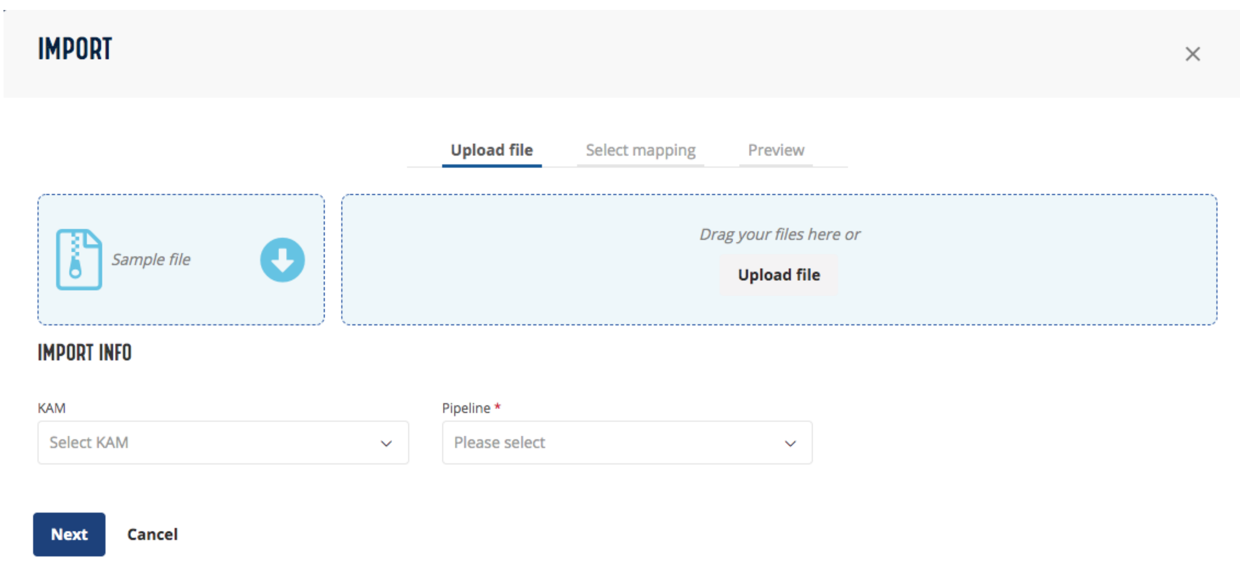
The salesperson can easily see where the sale is at and create notes or cases to follow up the sale.

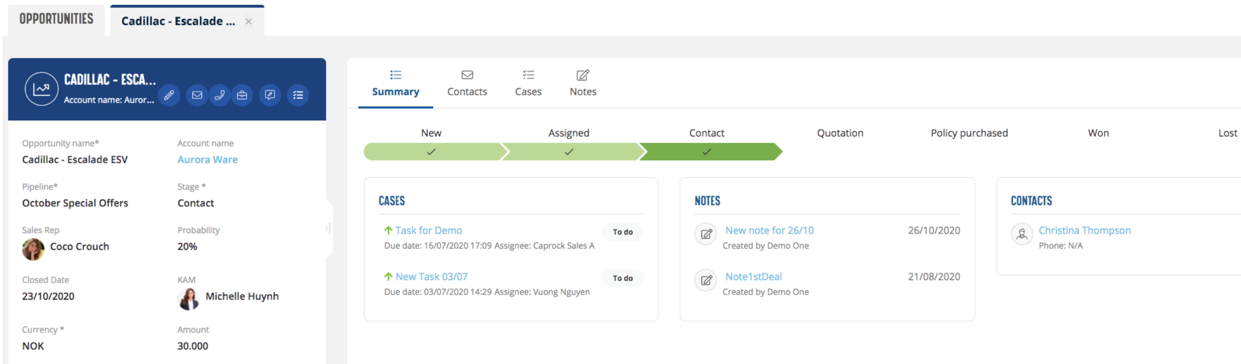
SCREENSHOT


SALES LIST
Create New Sale
Import Sales
Filter


SALES
SALES LIST
Create New Sale
Import Sales
QUOTE CREATED
EUR: 860.000; NOK: 0; KRW: 4.333.545;
POLICY PURCHASED
CAD: 900; SGD: 150.000;
WON
NOK: 0;
LOST
NOK: 2.000;
AUTO - ERLE - 099
Edit
Notes
Delete
WEALTH - GARBRIELLE STI - 778
Gabrielsen STI
Account
Amount:
CAD 900
Closed Date
N/A
90 %
Bugle Boy
Bugle Boy
Account
NOK 0
100 %
1999 Acura EL
Lotta T Skeie
NOK 2.000
0 %
LIFE - SOFIA- 456
Sofia A Vaughan
NOK 0
50 %
CAR - EWAN - NA543
Ewan E Lynch
SGD 150.000
16/11/2020
2005 MG XPower
Tomoko S Delc...


CREATE SALE
Choose from existing account
Search account
ACCOUNT INFO
First name *
Enter first name
Last name *
Enter last name
SSN / ORG. Id
Enter SSN / ORG. Id
Email
Enter email
KAM *
Select KAM
OPPORTUNITY
Pipeline *
Common Sales
Stage *
Open - New - 0%
Opportunity name *
Enter opportunity
Sales rep.
Select sale rep.
Currency
Norwegian Krone (NOK)
Create
Cancel


IMPORT
Upload file
Select mapping
Preview
Sample file
Drag your files here or
Upload file
IMPORT INFO
KAM
Select KAM
Pipeline *
Please select
Next
Cancel



HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Menu Sales and Pipeline management and select submenu Sales.

DESCRIPTIONS

❖ **HOW TO VIEW SALES LIST**

1. Go to menu Sales & Distribution and click on submenu Sales
2. Sales list will appear.
3. You can view the sales in Card view by clicking this button 

The user can take some actions on Sales list such as:

- Create a sale
- Import sales
- Edit a sale
- Create note for a sale
- Delete a sale
- Search sale

❖ **HOW TO CREATE A SALE**

1. Click on 

on Sales list
2. Select that the sale is created for a Person or Company (Private line account or Commercial account)
3. Create sale form will open
4. Enter information into below fields and click 

Choose From Existing Account: This is a dropdown list and displays the Accounts in the system. Depending on the account type you select when creating a sale, the list displays just Person or Company Accounts.

A sale must belong to an Account.

If you select an account from the existing accounts, the account info below will disappear.

If you do not select an account from the existing accounts, you need to enter the data into the Account info section below to create a new account for the sale.

Account info:

First Name: This is a Mandatory field.

Last Name: This is a Mandatory field

SSN/Org no.: This is an optional field. SSN/Org no. should be unique for an Account.

Email: This is an optional field.

KAM: This is an optional field.

Sale:

Pipeline: This is a mandatory field. Default is the “Is Default” pipeline which is set up in Pipeline management.

Stage: This is a mandatory field. A dropdown list displays all Deal stages of the Pipeline.

Sale Name: This is a mandatory field.

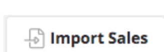
Sales Rep: This is an optional field. Sale rep is someone who works on the sale to get it done.

Currency: This is an optional field. A dropdown list which displays all currencies.

Amount: This is an optional field. Is the amount of the sale.

Closed Date: This is an optional field.

❖ HOW TO IMPORT SALES

1. Click on 

on the Sales list.
2. Import sales popup will open.
3. Drag and drop Sales file into Import section. Download a sample file if you don’t have it.
4. Select KAM (Optional) and Pipeline for the Sales and click Next

   On the Select mapping tab: If you use the Sample file that is downloaded from the system, all fields are mapped and you just need to click Next.

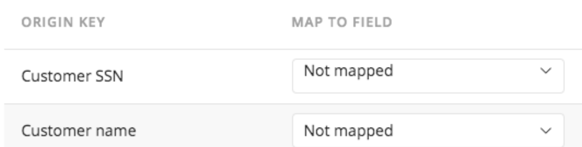
If you use another file which has a different format to the Sample file, you need to map the field manually. The mapping action here is to define the data in Imported file should fill into which fields of the system.

There are 2 options on Map To Field field: Not Mapped, Mapped

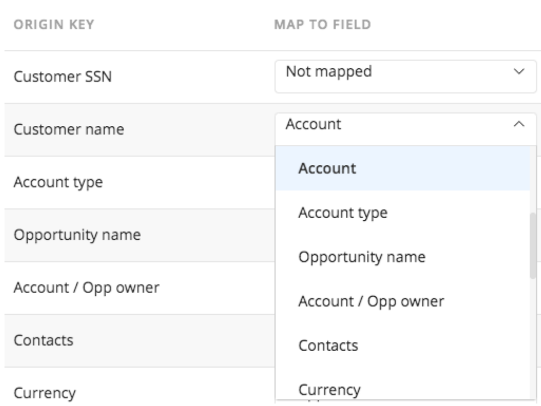
Not Mapped: the data on this column will not be imported into the system.

If you want to import the data from a Not mapped field into the system, you need to map the field manually.

Ex: The user imported a file which has 2 fields “Customer SSN” and “Customer”. The system does not recognize these two fields so it shows “Not mapped” .



If you want to map Customer name and Account field (in the system), select “Account” on Map to field.



Mapped: the data on this column will be filled in a predefined field in the system.

- ❖ **HOW TO EDIT A SALE**

1. Click on Edit button on Sales list or open the sale details page by clicking on the Sales name and click on Edit button .
2. Update sale detail page will open.
3. Edit information and click **Save**

❖ HOW TO DELETE A SALE

1. Click on Delete button on the Sales list.
2. You should be asked if you wanted to delete the sale.
3. Click Save to confirm that the sale will be deleted.

❖ HOW TO VIEW A SALES SUMMARY

1. Click on a Sales name on the Sales list.
2. The sale summary will open.
3. On sales summary, you can:

- Create notes for the sale
- Make a call to the account or contact person of the account
- Create tasks.

❖ HOW TO CREATE A NOTE FOR A SALE

1. Click on a Sales name on the Sales list.
2. Click on the Create note button to open Create note popup.
3. Input data into below fields:

- Title
- Description
- Related records: shows a list of records that are related to the note. The note created here should have the current sale as the default related records.

You can add more related records. Ex: if you add an account to the related record list, the note can be found on that Account summary.

❖ HOW TO MAKE A CALL

1. Click on a Sales name on the Sales list
2. Click on the Make a call button
3. Select a phone number. This can be the phone number of the account or the phone numbers of the contact people.

❖ HOW TO CREATE A CASE

4. Click on a Sales name on the Sales list
5. Click on Create case button to open Create case form.
6. Input data and click Save

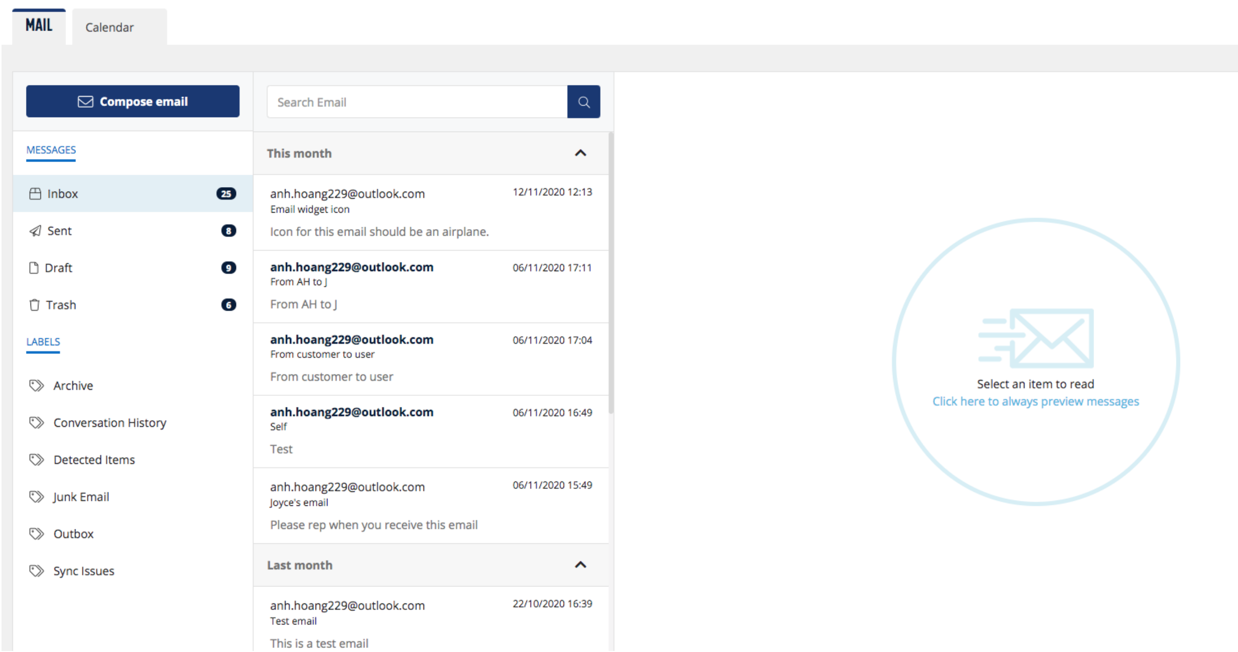
2.8 Communication

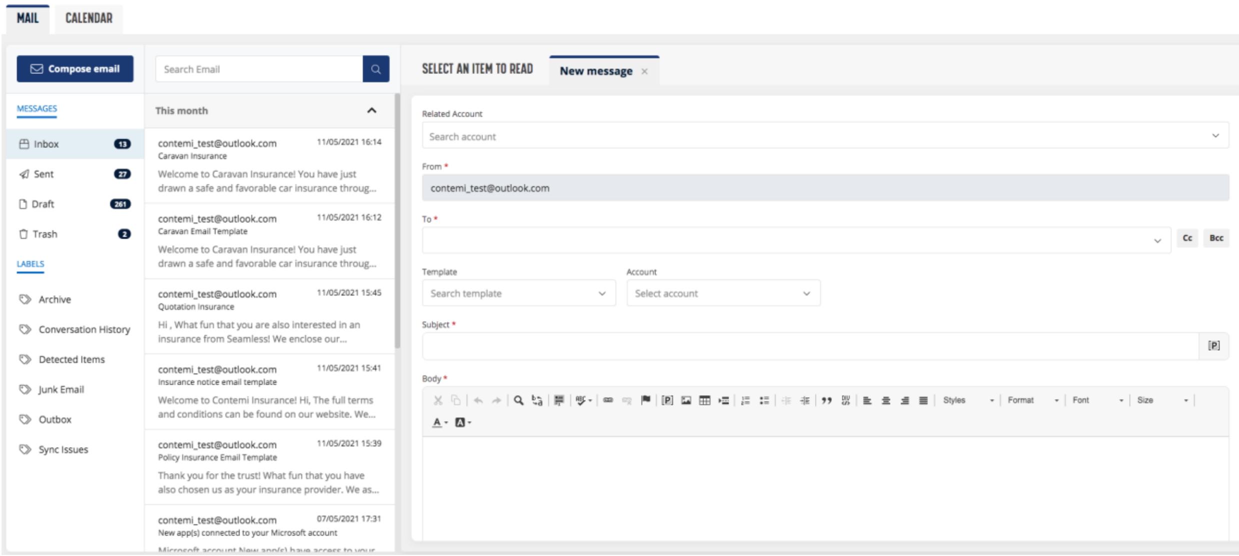
2.8.1 Mail

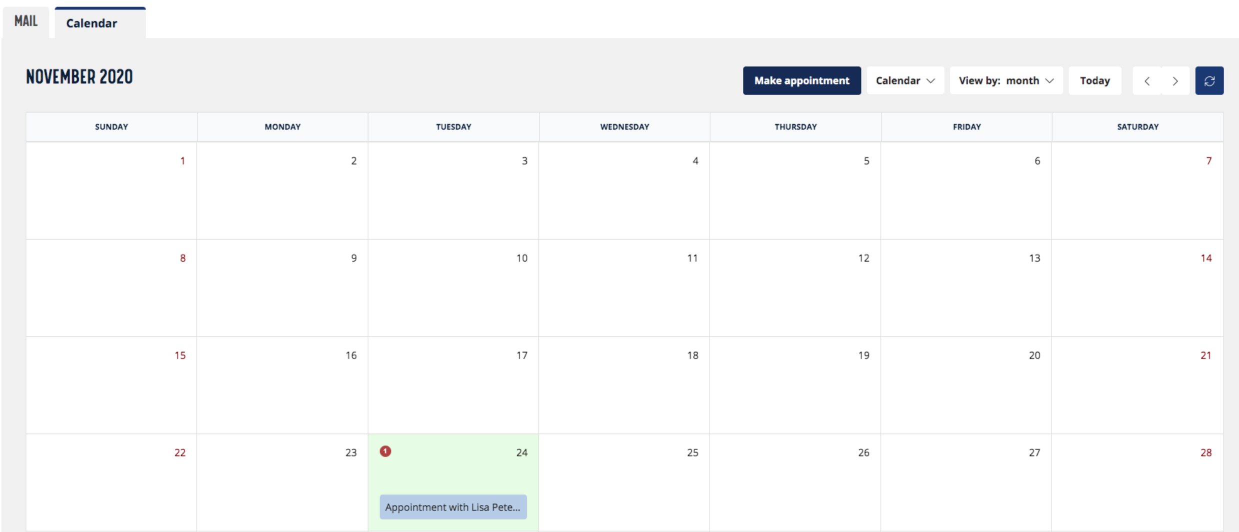
MAIN FUNCTION

This function allows you to send, receive emails, set up appointments by connecting your Outlook email with Seamless.

SCREENSHOTS







DESCRIPTION

❖ HOW TO CONNECT TO OUTLOOK

1. Login to the system
2. Click Setting icon at the top right corner.
3. Click Mail Setting. A Mail Setting popup will appear as below

4. Click Connect button in Outlook field.
5. You should be navigated to https://login.microsoftonline.com/ page
6. Input your email address to connect.

- **HOW TO SEND EMAIL**

After connecting to Outlook, you can send emails by

1. Go to Communications > Mail
2. Click **Compose Email**
3. Input data into below fields and click **Send**

Related Accounts: this field is optional. The user can search and select multiple accounts. When an account is selected:

- The email address of that account will be available to select in To field
- The information of this account can be used to replace data in template
- The documents of this account can be attached to the email easily.

From: this field is required. Default display the email address you're connecting

To: email addresses of the people that you want to send the email to. This field displays all email addresses of related accounts. However, you can enter other email addresses manually.

Cc: email addresses of the people that you want to cc the email to. This field displays all email addresses of related accounts. However, you can enter other email addresses manually.

Bcc: email addresses of the people that you want to bcc the email to. This field displays all email addresses of related accounts. However, you can enter other email addresses manually.

Template: You can select an email template which is predefined in Template management module

Subject: This field is required. This field is prefilled automatically when a template is chosen.

Body: This field is required. This field is prefilled automatically when a template is chosen.

Account's Document: this field lists out all documents of related accounts.

Attachment

- **HOW TO MAKE APPOINTMENT**

After connecting to Outlook, you can make an appointment by

1. Go to Communications > Mail

2. Open Appointment tab
3. Input data into below fields and click Save

Date: Date of the appointment.

If you tick on All day checkbox, Start time and End time fields will be hidden.

Start time

End time

Attendees: You can select the email addresses of other users in the system or enter the email address of the Account, Lead, Contact...

Body

2.8.2 Call Center

MAIN FUNCTION

This function allows you to have incoming and outgoing telephone calls from both new and existing accounts, leads, contacts.

Call center provides the agents with access to account information and history instantly, which allows them to help customers with up-to-date and relevant information during support.

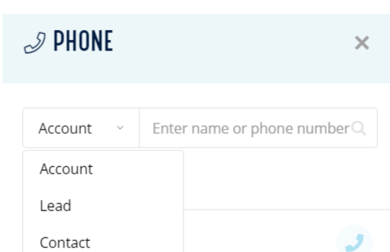
DESCRIPTION

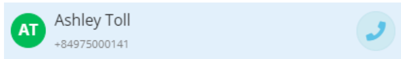
- **HOW TO MAKE A CALL**

Note: You must be added into a Phone queue in order to make a call.

MAKING A CALL FROM GLOBAL MENU

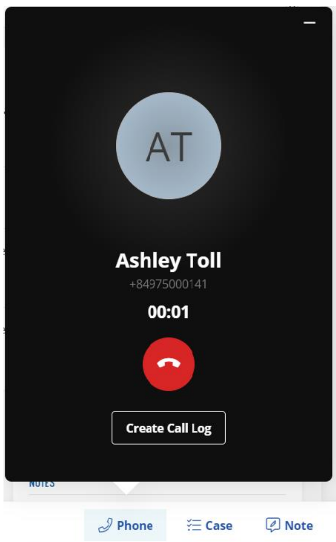
1. Navigate to Communications > Call center. Phone queue list will appear.
2. Click Connect button on the Queue which you want to connect to.
3. Click Phone on the Global menu at the right bottom of the screen. Phone popup will open.
4. You can make a call to an Account, Lead or Contact. Select the entity and input name of account, lead or contact into the search field to search for the right person to call.



5. Click Call icon 

❖ **MAKING A CALL FROM ACCOUNT SUMMARY SCREEN**

1. Navigate to Accounts > Accounts
2. Search for the Account which you want to make a call and open the Account summary screen.
3. Click on the Phone icon. The phone number of the account will appear.
4. Click on the phone number. Phone call popup will open and start the call.



❖ **MAKING A CALL FROM SALES SUMMARY SCREEN**

1.Navigate to Sales & Distribution > Sales

2. Search for a sale

3. Click on the Phone icon. The phone numbers will appear. It could be the phone number of the Account or Contacts.

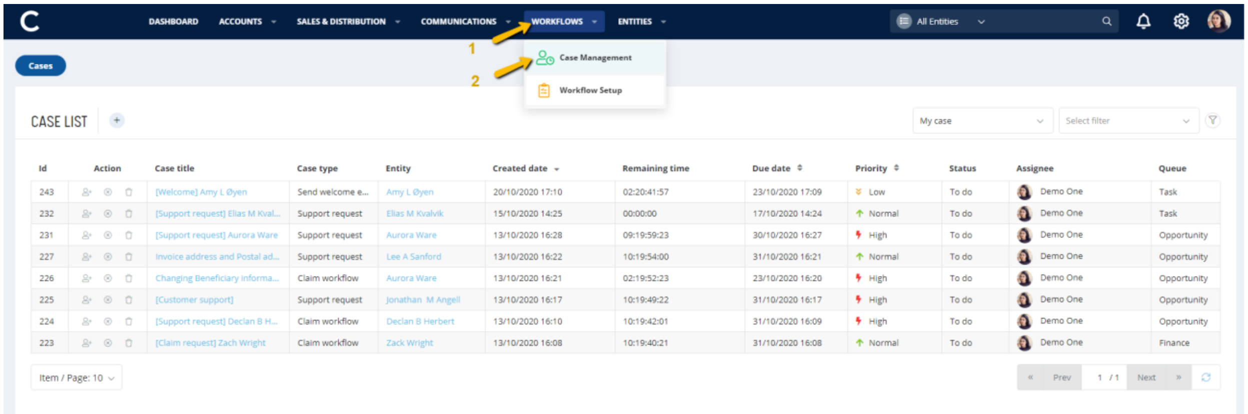
4. Click on a phone number. Phone call popup will open and start the call.

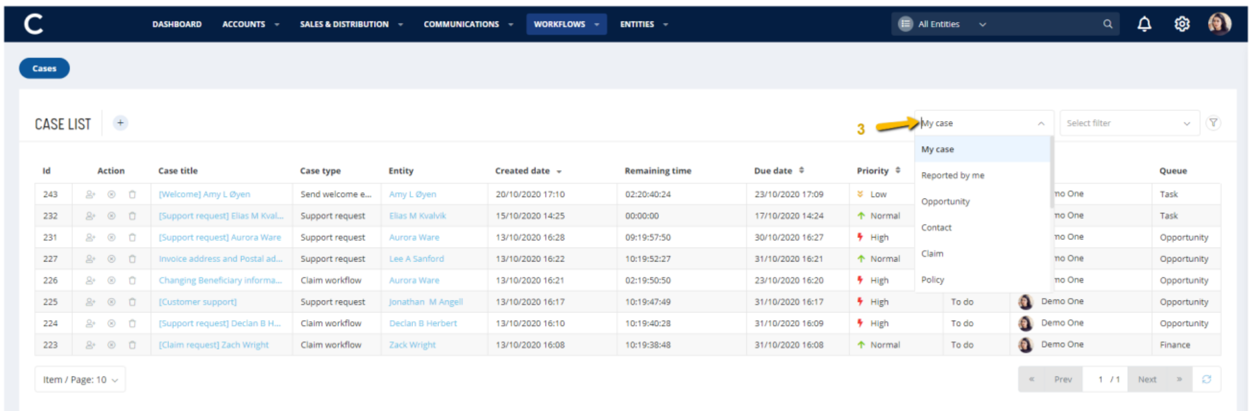
2.9 Workflow & Case

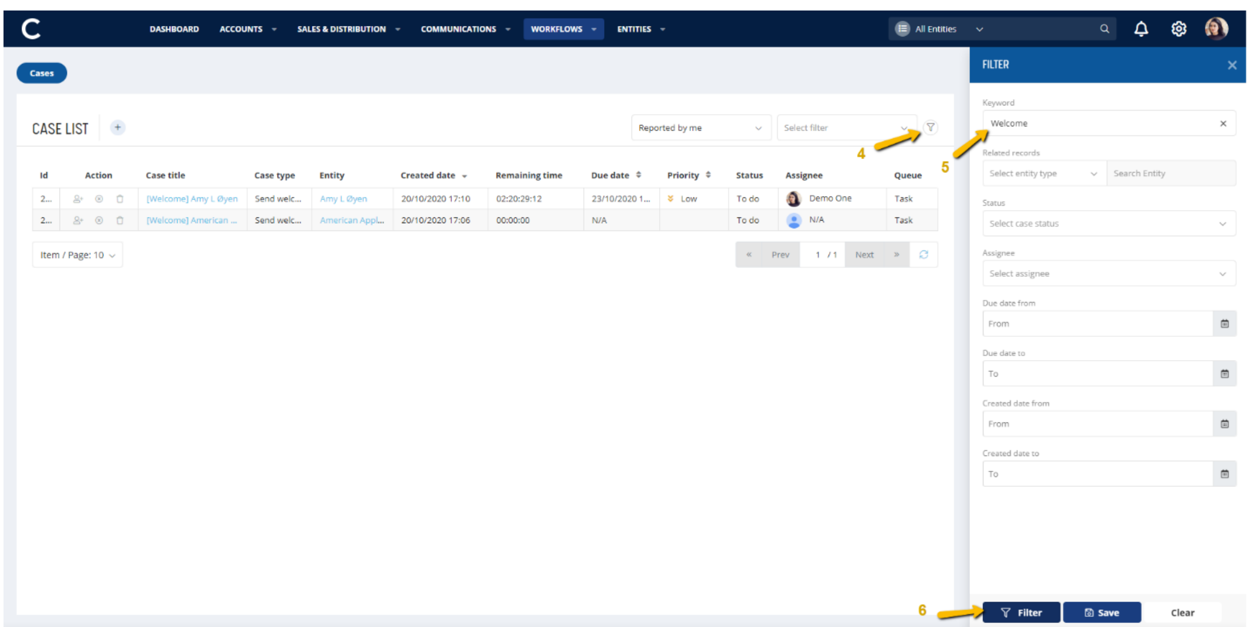
2.9.1 Case Management

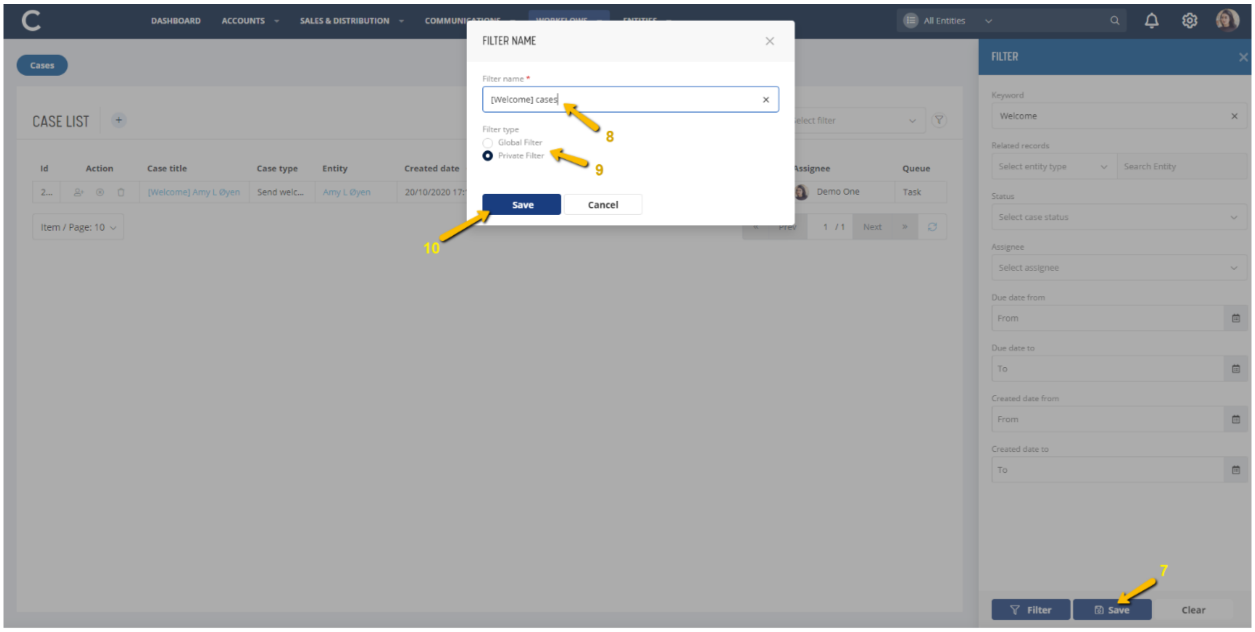
Case List

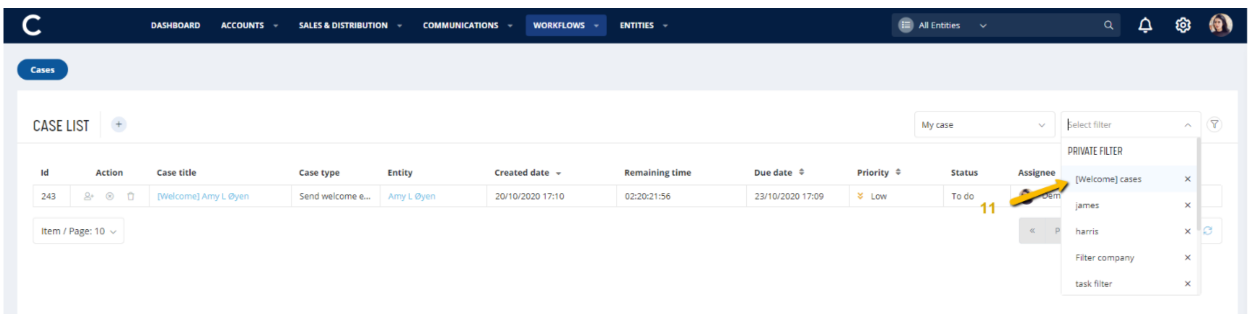
SCREENSHOT


DASHBOARD
ACCOUNTS
SALES & DISTRIBUTION
COMMUNICATIONS
WORKFLOWS
ENTITIES
All Entities
1
2
Case Management
Workflow Setup
Cases
CASE LIST
My case
Select filter
Id
Action
Case title
Case type
Entity
Created date
Remaining time
Due date
Priority
Status
Assignee
Queue
Item / Page: 10
Prev
Next


DASHBOARD
ACCOUNTS
SALES & DISTRIBUTION
COMMUNICATIONS
WORKFLOWS
ENTITIES
All Entities
Cases
CASE LIST
3
My case
Select filter
My case
Reported by me
Opportunity
Contact
Claim
Policy
Item / Page: 10
Prev
Next


DASHBOARD
ACCOUNTS
SALES & DISTRIBUTION
COMMUNICATIONS
WORKFLOWS
ENTITIES
All Entities
Cases
CASE LIST
Reported by me
Select filter
4
5
FILTER
Keyword
Welcome
Related records
Select entity type
Search Entity
Status
Select case status
Assignee
Select assignee
Due date from
From
Due date to
To
Created date from
From
Created date to
To
6
Filter
Save
Clear
Item / Page: 10
Prev
Next





HOW TO FIND

1. Click WORKFLOWS menu

2. Select “Case Management”, it shows a list of “My case” cases by default, they are the cases assigned to the current logged-in user.

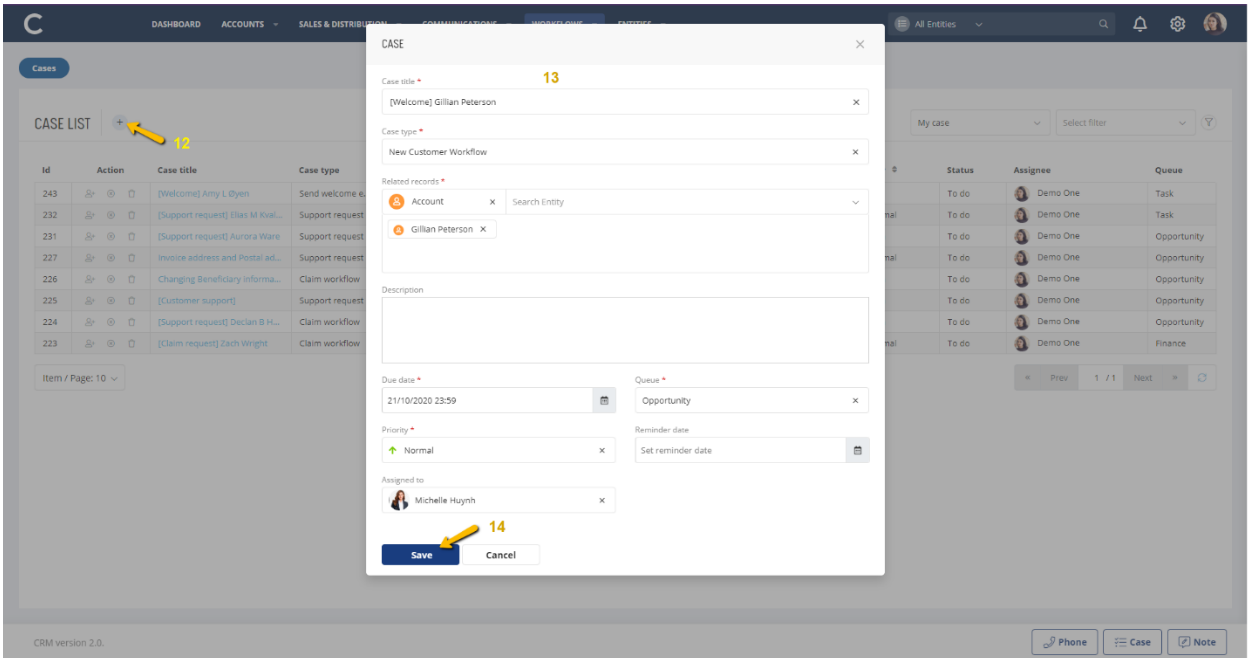
3. Use quick-filter to find your cases. Quick-filters consists of “My case”, “Reported by me” and Task queues.

4 to 6. Use customized-filter to set your search criteria and find cases that match.

7 to 11. The customized-filter can be saved and then found as an option at “Select filter” drop down list.

Create New Case

SCREENSHOT



HOW TO FIND

12. Open Create Case form

13. Fill up the form

14. Click Save button

DESCRIPTION

All the fields in Create Case form are blank by default.

Case type is a combo box and shows the list of workflows that are available in the system

Select entity type is a combo box and allows the user to select an entity type, e.g. Account, Contact, Lead, etc.

Search Entity allows the user to find and select an entity record that belongs to the selected entity type, e.g. Entity type is “Account” then the user can search for accounts, other entities’ records (e.g. Leads) won’t appear in this box.

Description is a free text field.

Due date is a date-time picker.

Queue is a combo box that shows all the task queues to which the logged-in user belongs.

Priority is a combo box with four options: Low, Normal, High, Critical.

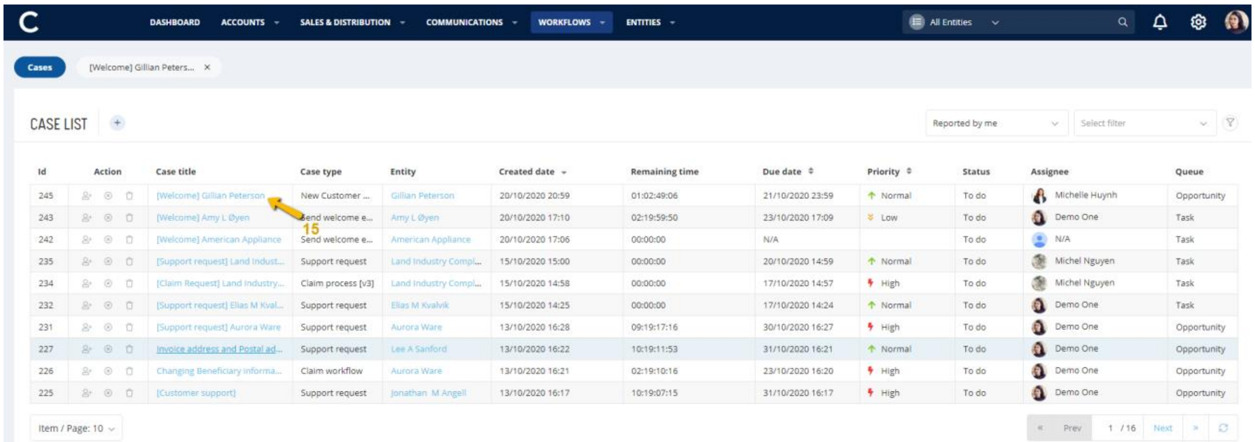
Assigned to shows a list of users who belong to the selected queue.

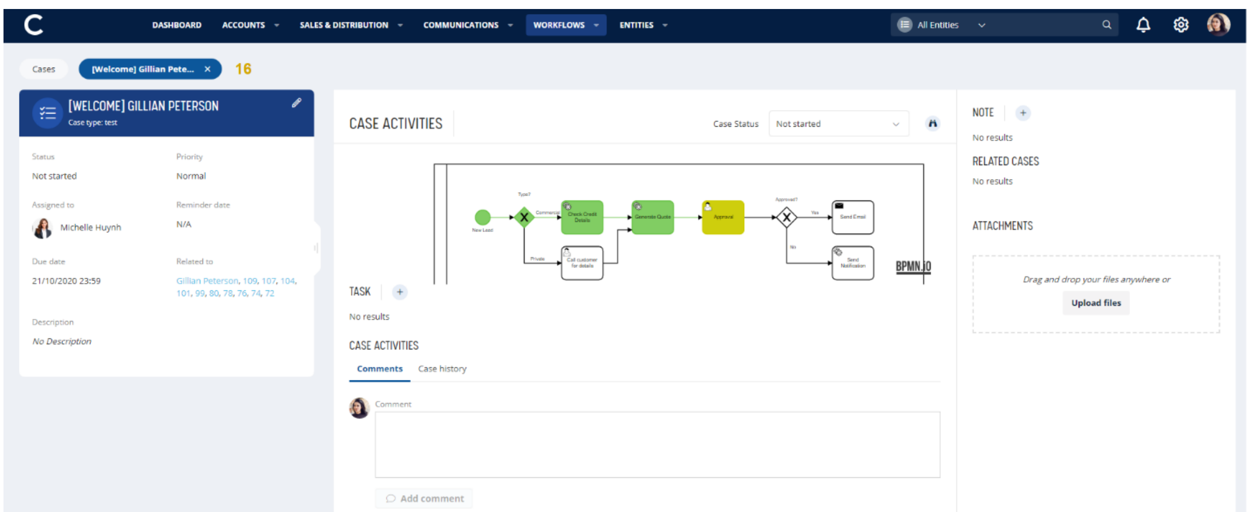
When the Save button is clicked, it saves the inputs and the form is closed.

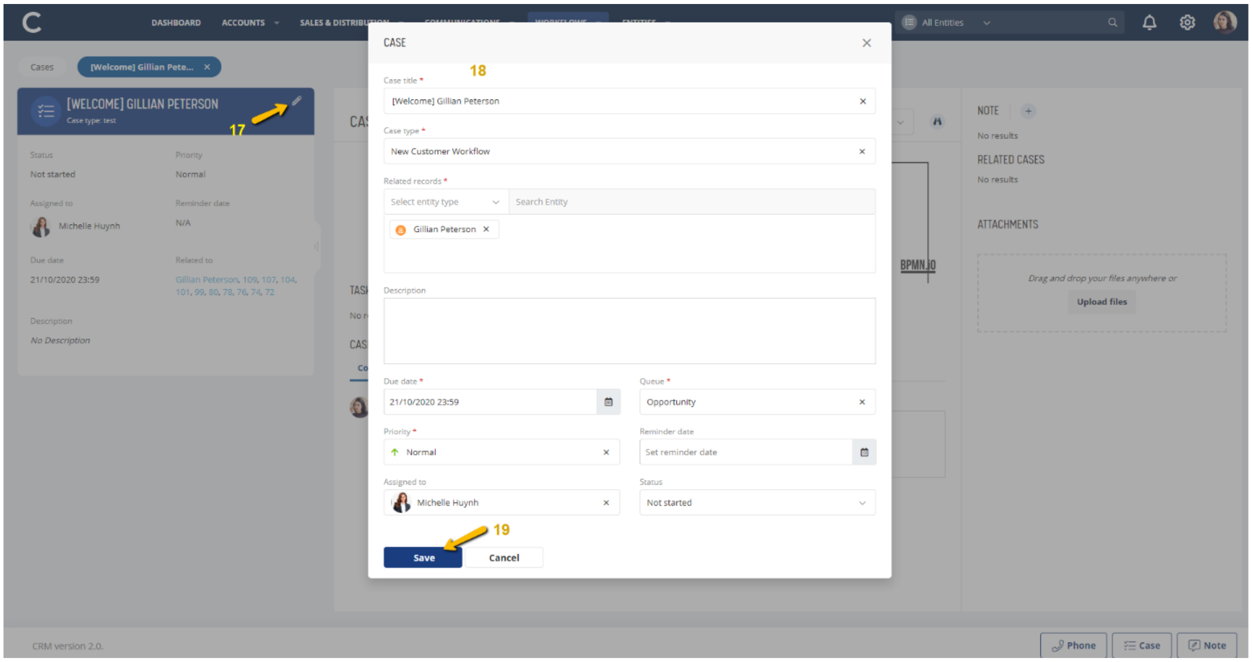
When the Cancel button is clicked, it doesn't save the inputs and the form is closed.

Edit Case

SCREENSHOT







HOW TO FIND

15. Click the Case Title

16. It shows the Case Details page

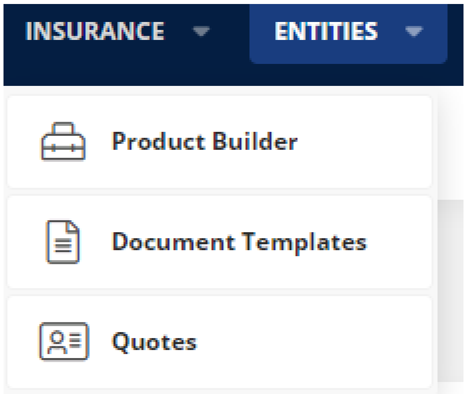
17. Open Edit Case form

18. Make valid amendment/update

19. Click Save button to save the updates or click Cancel to close the form without saving anything.

2.10 Insurance

Module Insurance

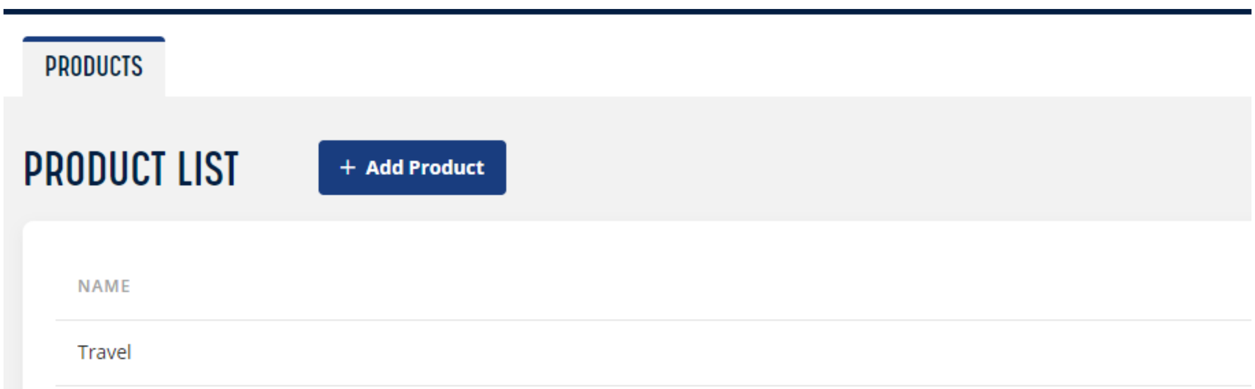


- Menu “Product Builder” - details in section Product Builder
- Menu “Document Templates” - details in section Document Templates
- Menu “Quotes” - details in section Quotes

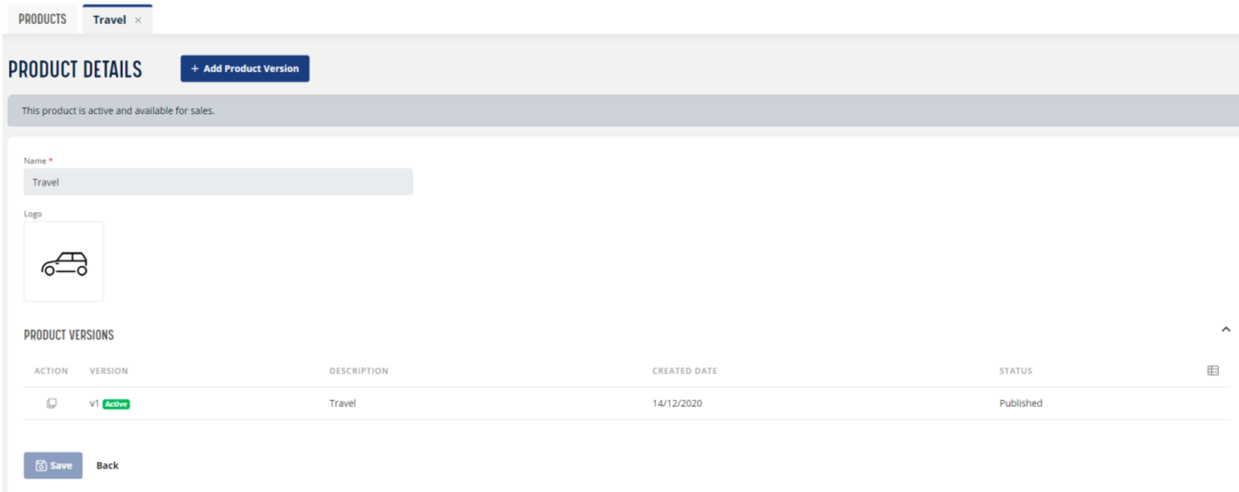
2.10.1 Product Builder

“Product Builder” is the module to manage insurance products which includes building new products, launching new products, or creating new product versions, etc.

When clicking on the menu “Product Builder”, all products should be displayed, as shown below.



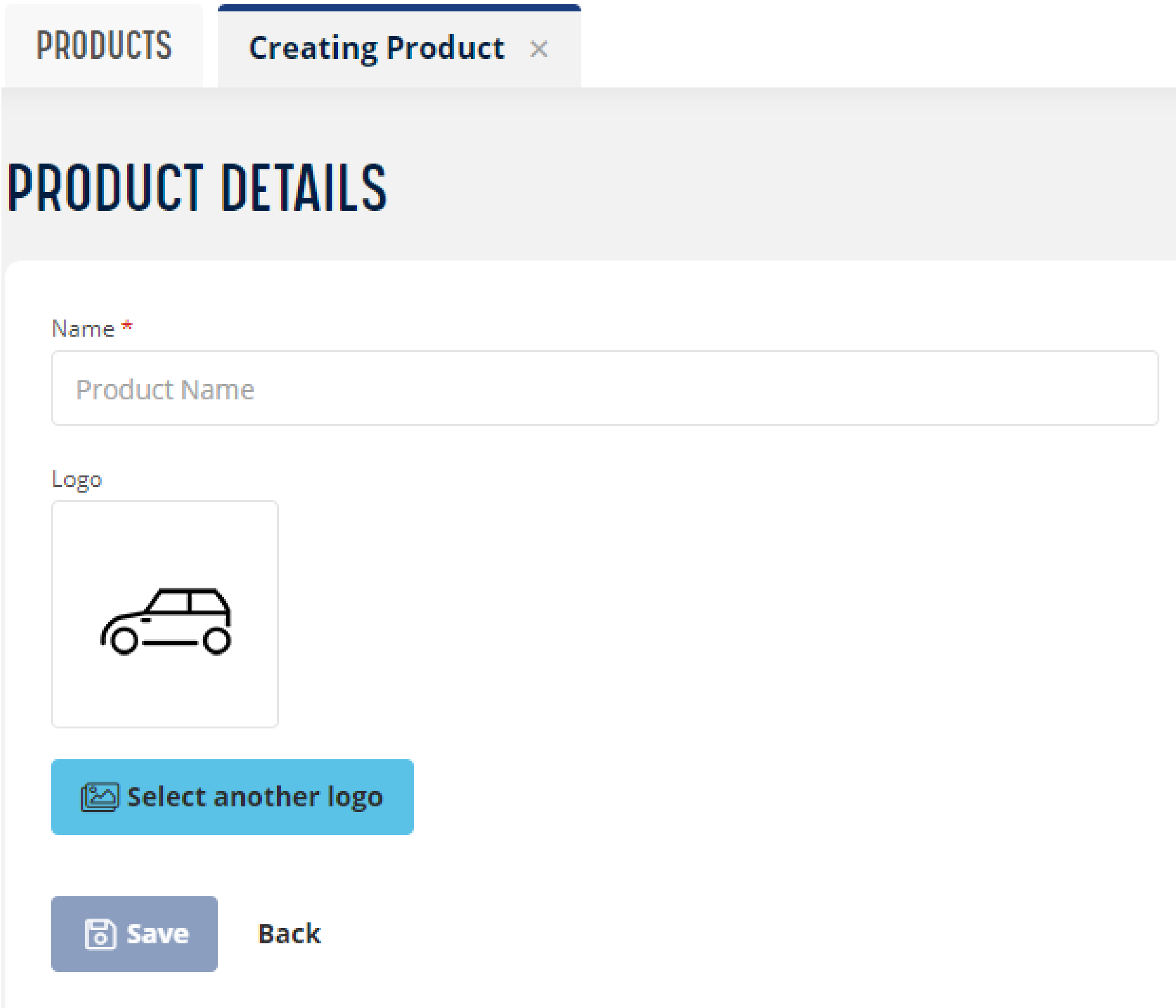
Clicking on product name would open up a new tab with details:



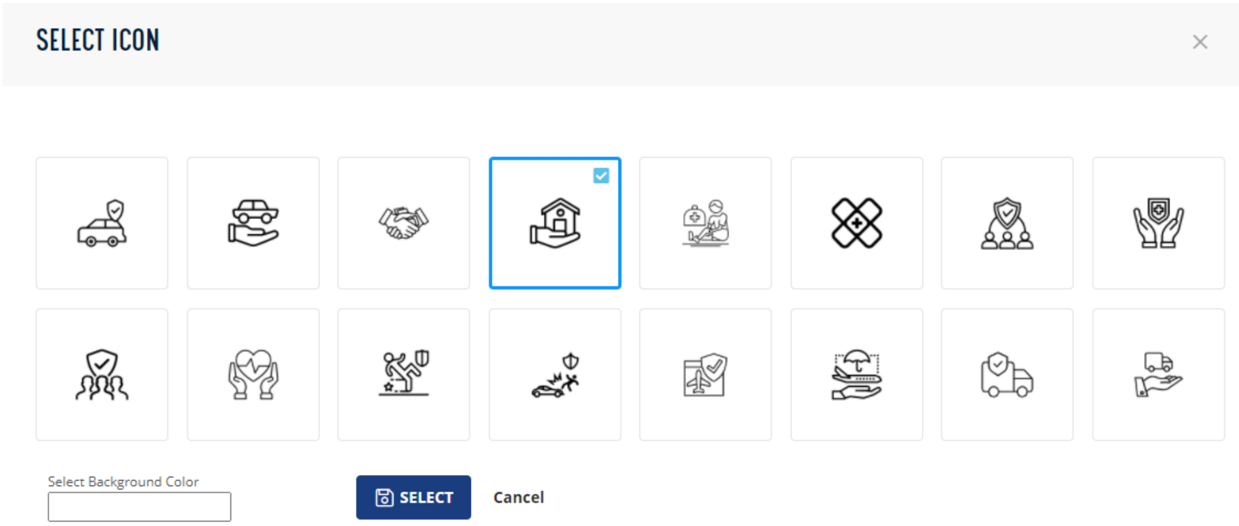
- Users should be able to perform:
    - Create new product version - see detail at section Add new product version
    - Clone existing product version - see detail at section Clone existing product version
- If the product is currently available for sales, a notification would be displayed on the top of the page - as shown above.

2.10.1.1 Add new products

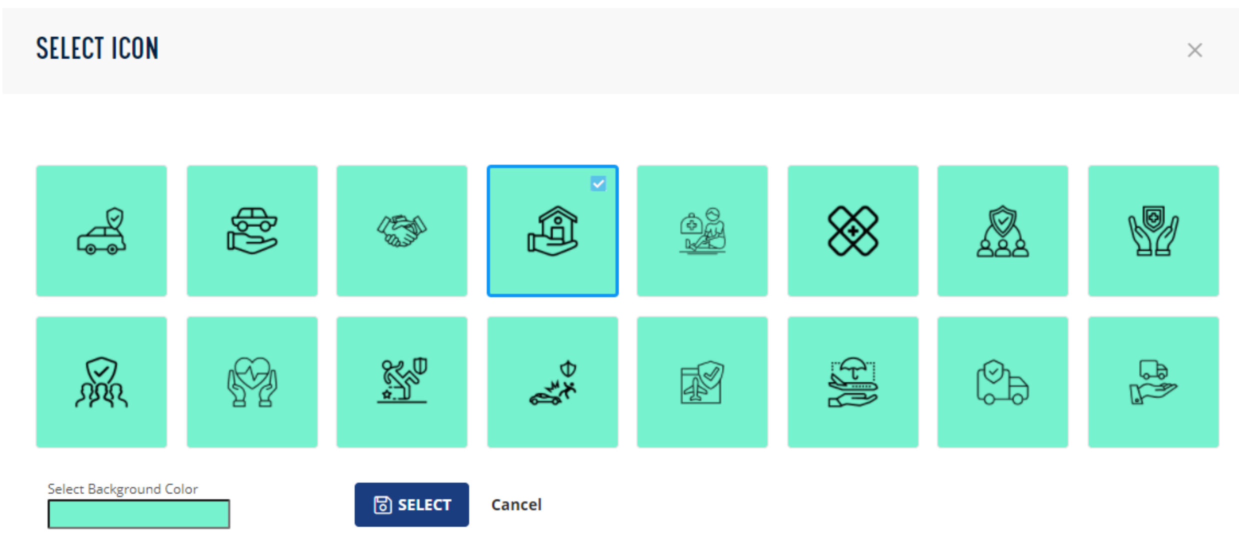
Clicking on the button “Add Product” would open a new tab, in which users must fill in required fields for new products creation.



- Product name must be filled.
- Product logo can be selected in a gallery when clicking on button “Select another logo”



- Selected product icon would have the green tick on the top right.
- Users should be able to change background colour via the color picker “Select background color”.

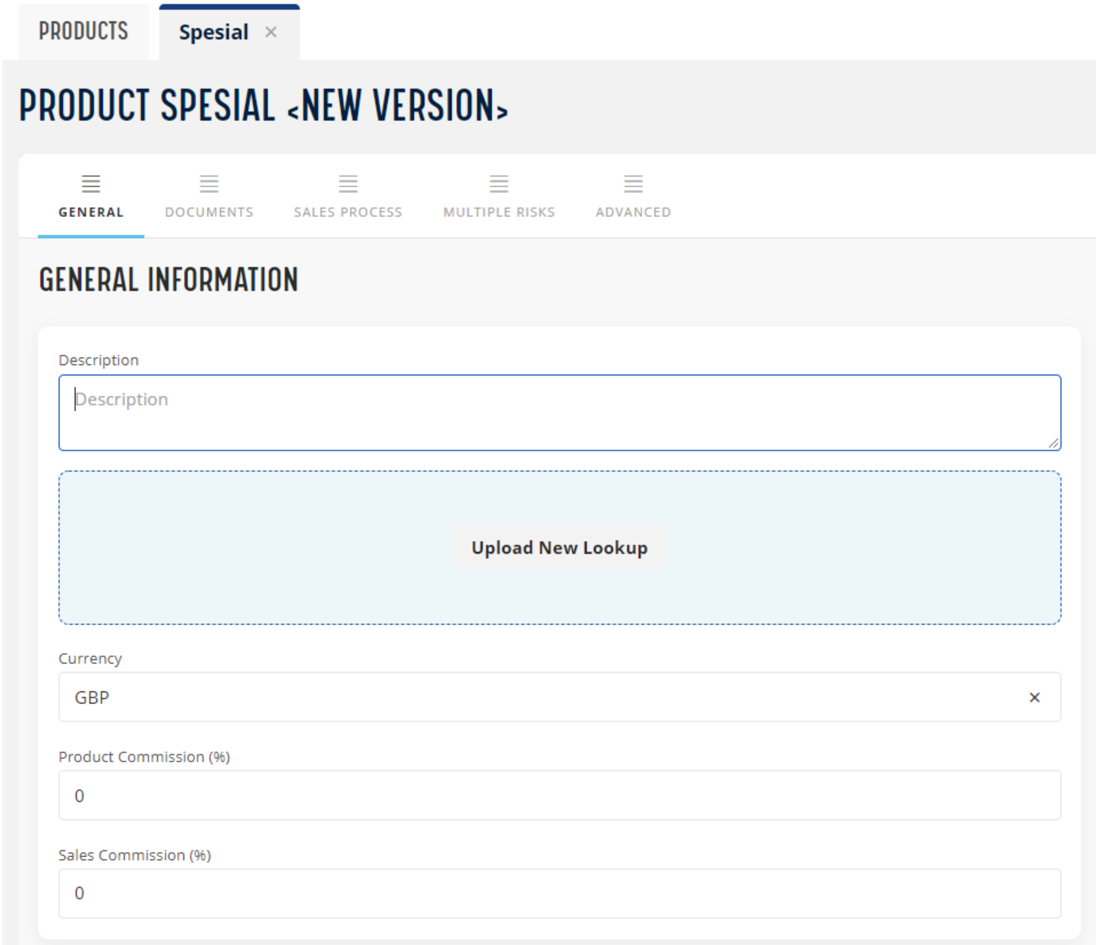


- The selected product icon and background color will be displayed in the Product selection page as long as the new product is published.

2.10.1.2 Add new product versions

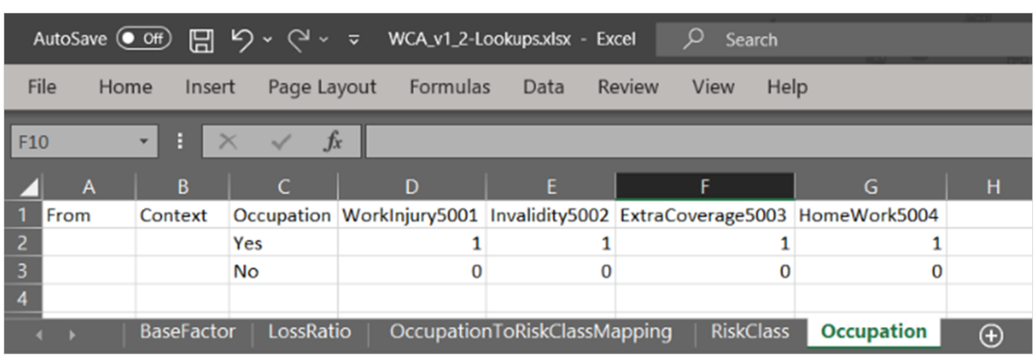
After saving the new product, the button “Add new product version” should appear.

Clicking on “Add new product version” opens product version details page:



There're 5 tabs:

- General: includes the information of product version such as description, lookup file, currency, product commission and sales commission.
    - Description: short description of the product version
    - Lookup file: an excel file defining which answer matches which factor value for premium calculation. Example:



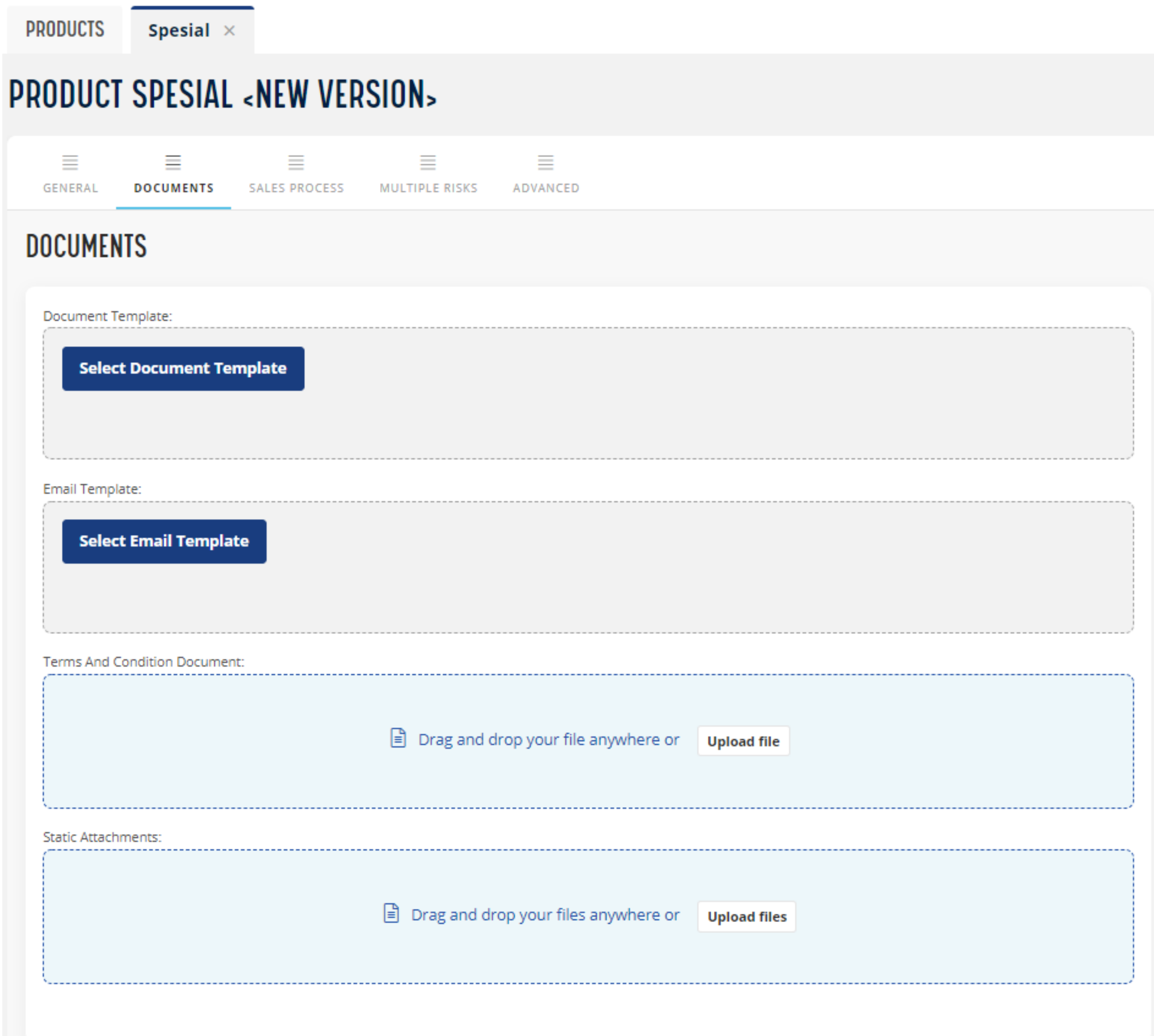
    - Currency: each product can only have one currency. Seamless currently supports up to 11 currencies which are: AUD, CAD, DKK, EUR, GBP, JPY, NOK, SEK, SGD, USD, VND.

- Product commission (%): here defines the default percentage at Product Commission that user can adjust during quotation process.
- Sales commission (%): here defines the default percentage at Sales Commission that user can adjust during quotation process.

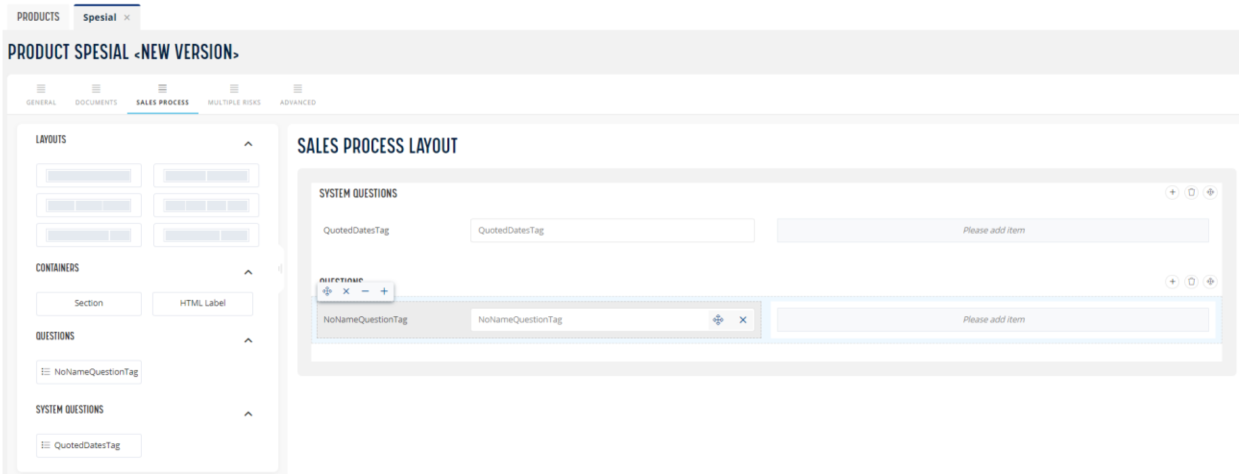
- Documents:

  This section defines email and document template for the current product version. When generating emails/documents for quotes/policies that are created for this product, the selected template should be used. Details about templates are available in section Document templates.

  Email attachments like Terms and Condition and other static document can be setup here as well.

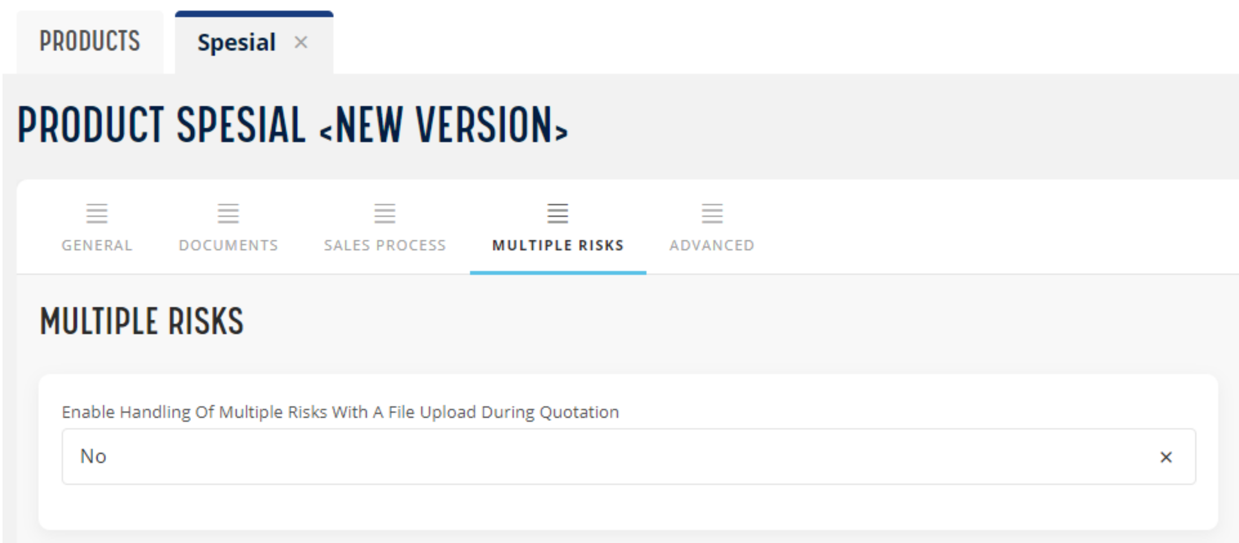


- Sales process: users can modify the layout of questions that are included in the current product version.

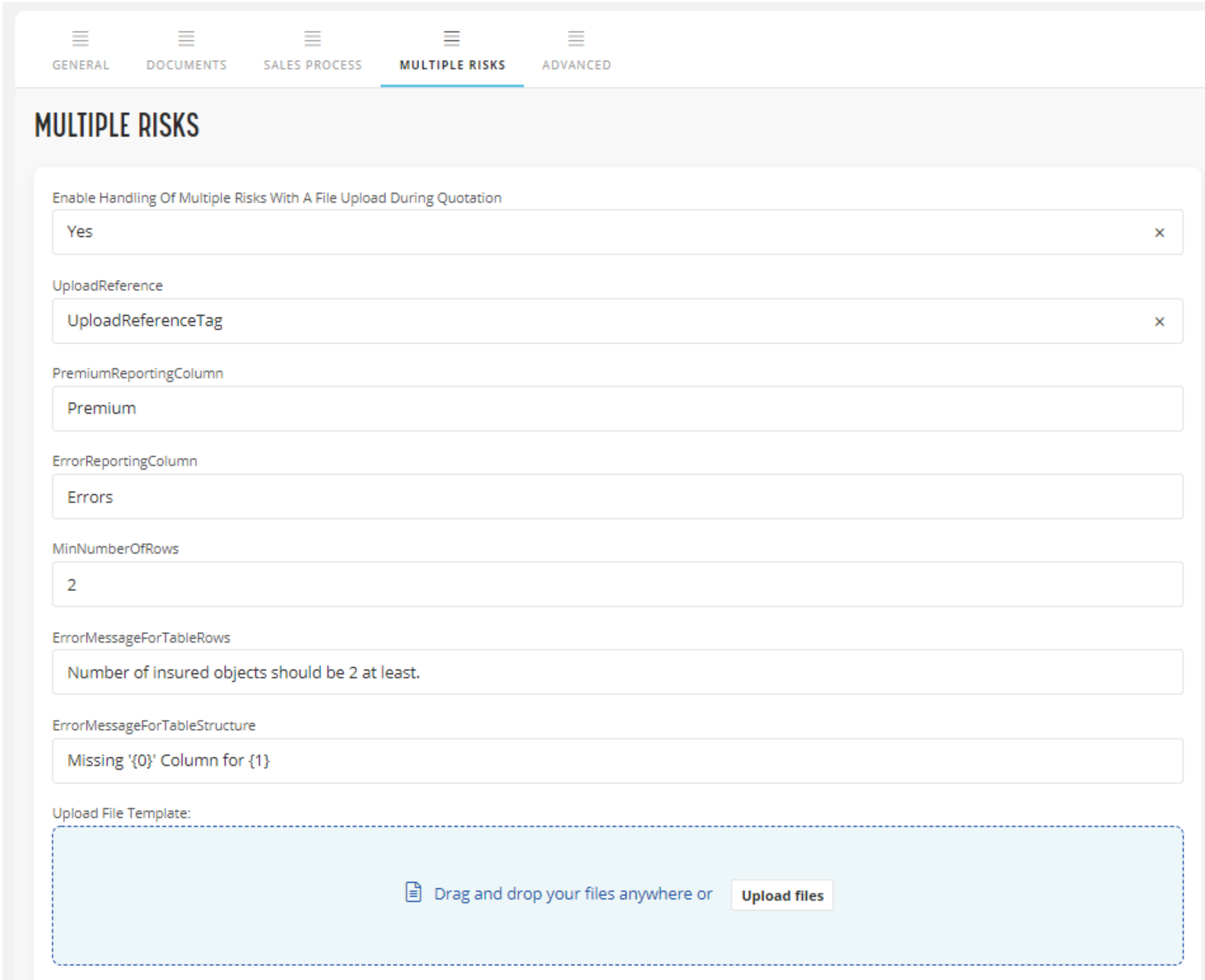


- Multiple risks:

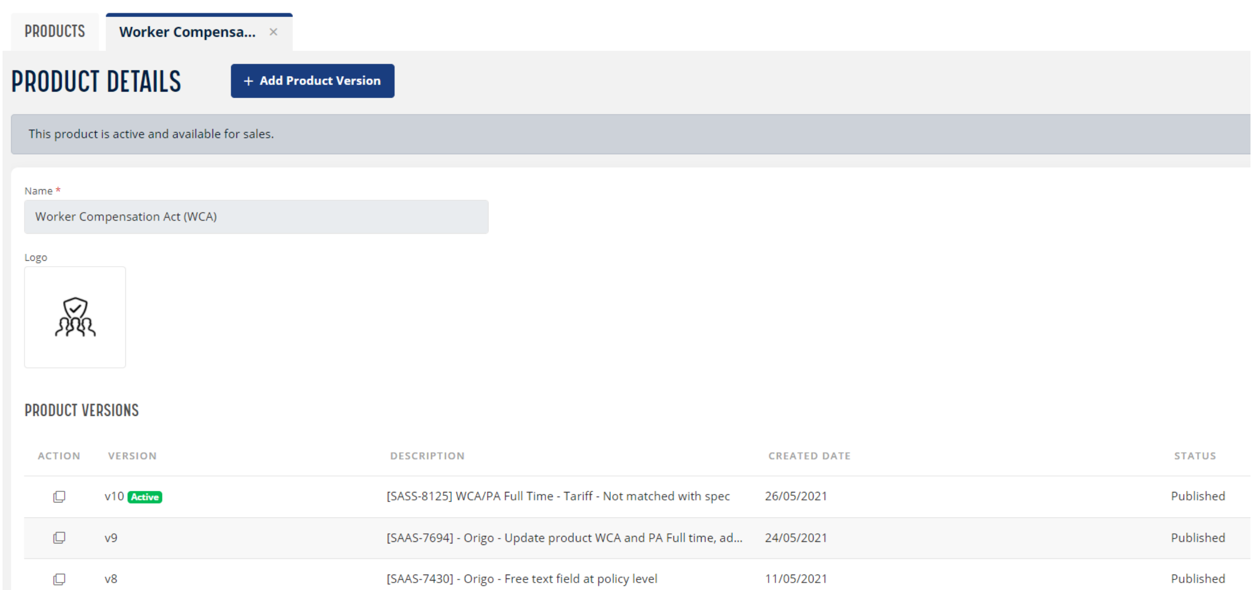
  The brand-new product version is for single insured object by default.



Users can turn it to multiple insured object product by select Yes and fill up these setup fields:



Once a product version is saved, it can be found at Product Details page



- Product version status:
    - Draft: users are still able to modify product version information at this state
    - Published: users should not be able to modify.
    - Active: product version is under sales. At the time, only one product version is active.
- When a new product version is published:
    - Previous version (if have) should be set to “Published”
    - New product version should be set to “Published” and “Active”

2.10.1.3 Add product to sales channels

Users/Product builders should define products should be sold under which sales channels, so that when users would like to create quotes for that product, they should go to the defined sales channel.

How to add products to sales channels? - see details at section Sales Channels

2.10.1.4 Clone existing product version

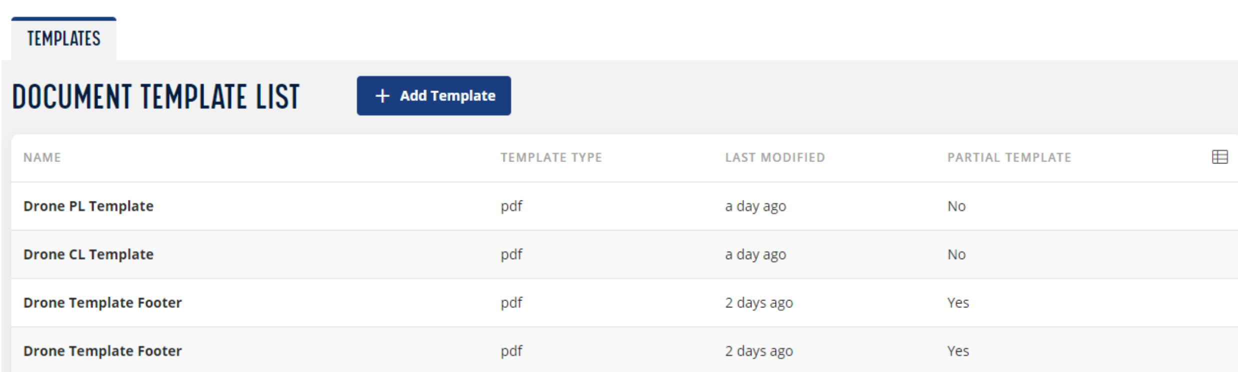
When clicking on the button to clone an existing product version, a new product version is created based on the selected version.

- Tab General, Sales Process, Advanced: initial values should be carried over from the cloned product version.
- Users should be able to modify product version information until the new version is published.

2.10.2 Document Templates

Document templates are used to generate documents when customers purchase a policy or request for a proposal. Some placeholders are provided, and users can create templates for specific product versions by using placeholders.

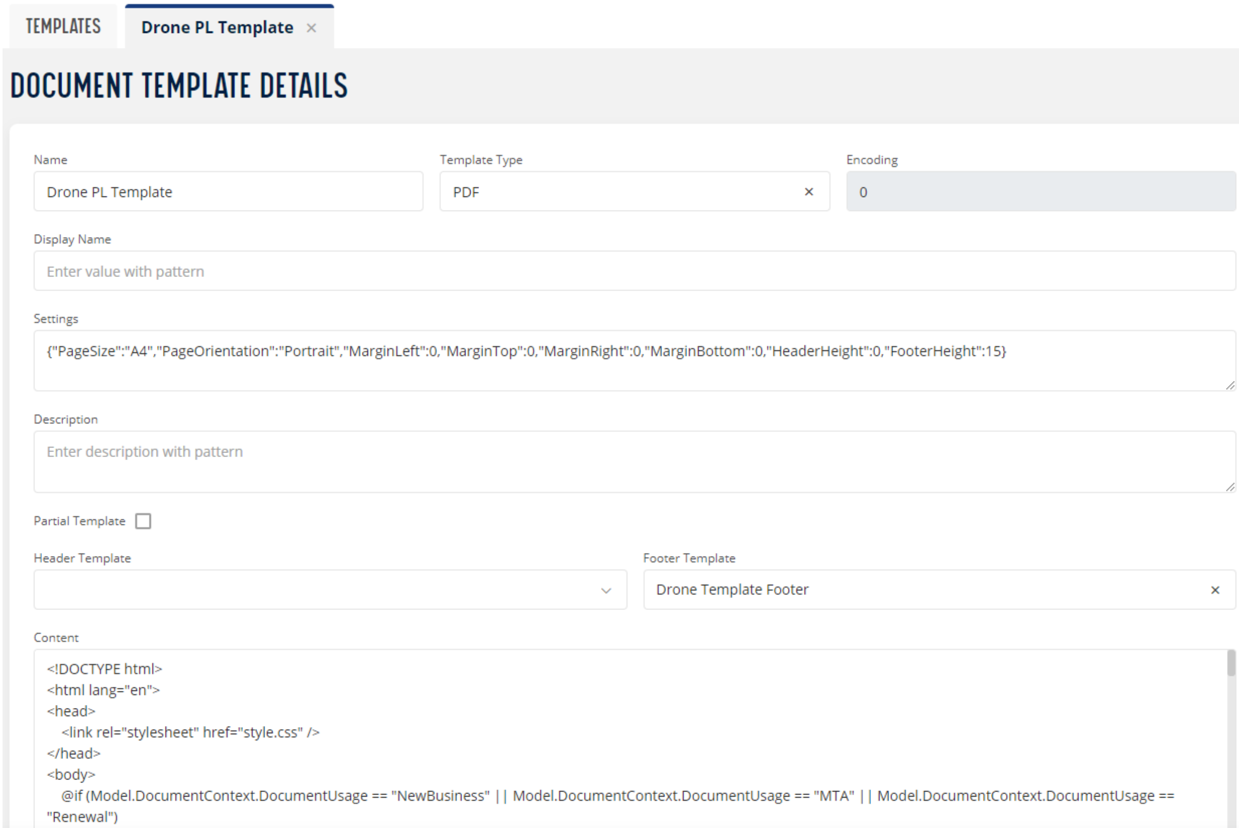
When clicking on the menu “Document templates”, the list of templates should be displayed, as shown below:


TEMPLATES

DOCUMENT TEMPLATE LIST   + Add Template

NAME	TEMPLATE TYPE	LAST MODIFIED	PARTIAL TEMPLATE
Drone PL Template	pdf	a day ago	No
Drone CL Template	pdf	a day ago	No
Drone Template Footer	pdf	2 days ago	Yes
Drone Template Footer	pdf	2 days ago	Yes

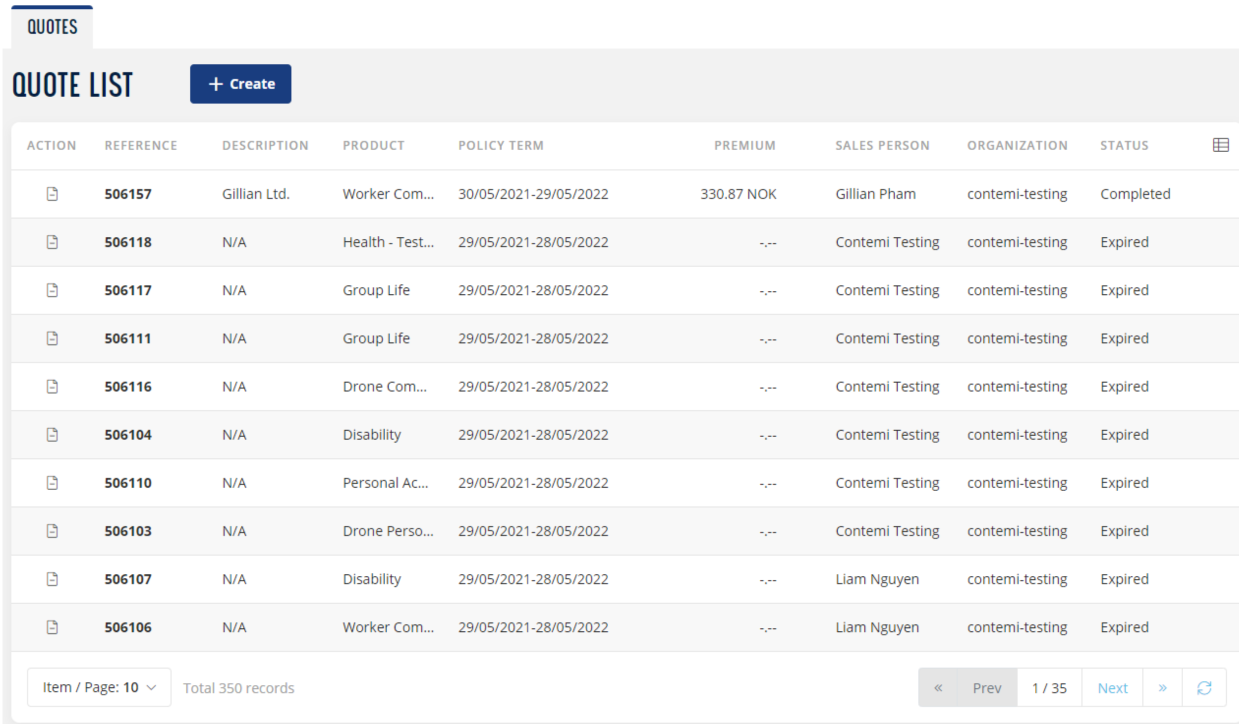
- Button “Add Templates”: create a new document template. This would trigger opening up an empty document template detail page.
- Clicking on the document template name would open up a new tab, and tab name is the name of the selected document template.



- Name: the name of the document template that would be displayed in the list, and also in dropdown template in product version details.
- Encoding: this value is set default by the system.
- Template type: this indicates the type of document such as PDF, Email, SMS. This also affects the generated document from this template.
  - If the type is PDF, generated document should be in PDF format
  - If the type is Email, generated document should be in HTML format
  - If the type is Email, generated document should be in TXT format
- Display name: this defines the document file name, placeholder is accepted.
- Settings: this defines the layout format for generated documents, and it is hard-coded by the system currently.
- Partial template: if ticked, the template is available for other template to use. It appears as an option of Header Template and Footer Template.
- Content: this defines the content of generated documents. Contents should be composed in RAZOR/CSHTML.

2.10.3 Quotes (Anonymous quotes)

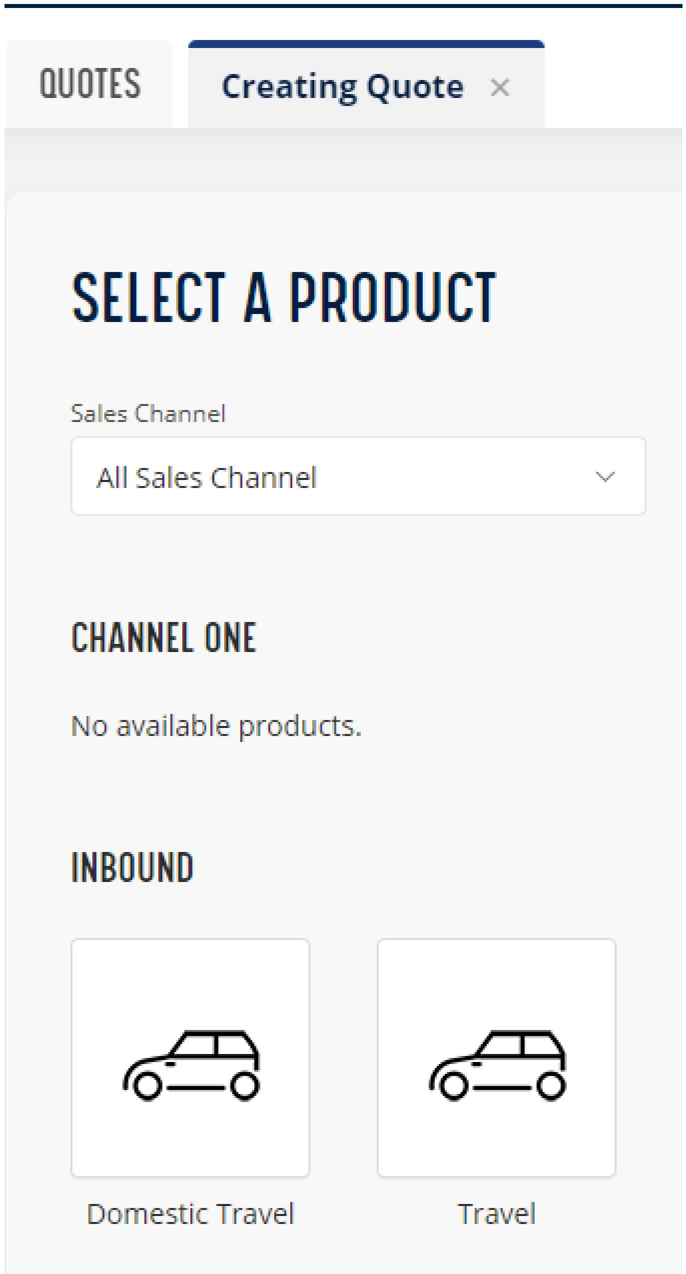
This quote list only contains quotes that are not created for any specific customers (known as anonymous quotes).



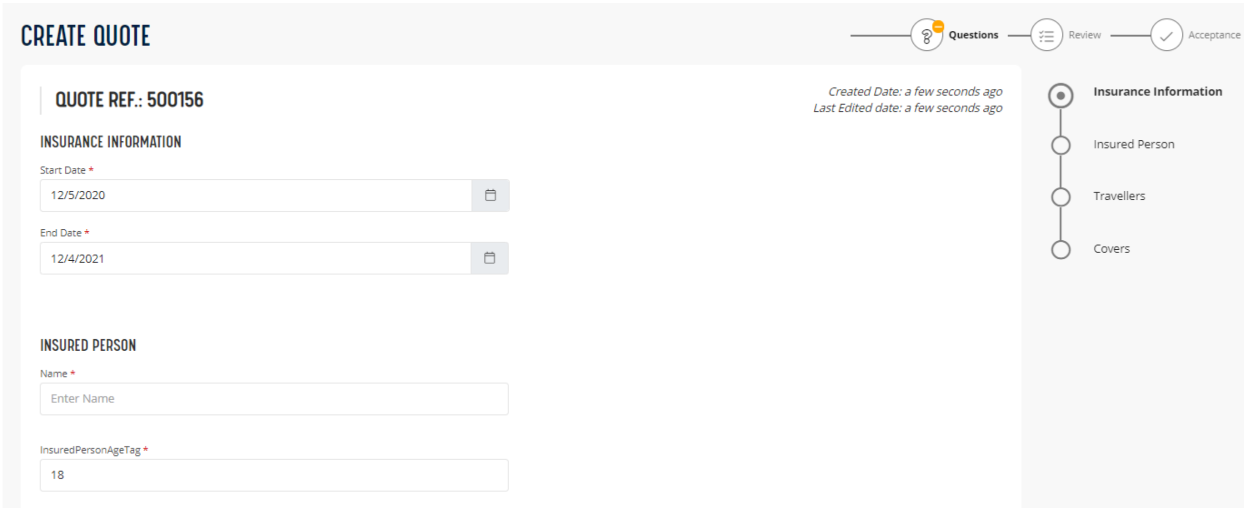
2.10.3.1 Create/edit anonymous quote

Clicking on the button “Create” will create a new quote without customer information required. When creating a quote:

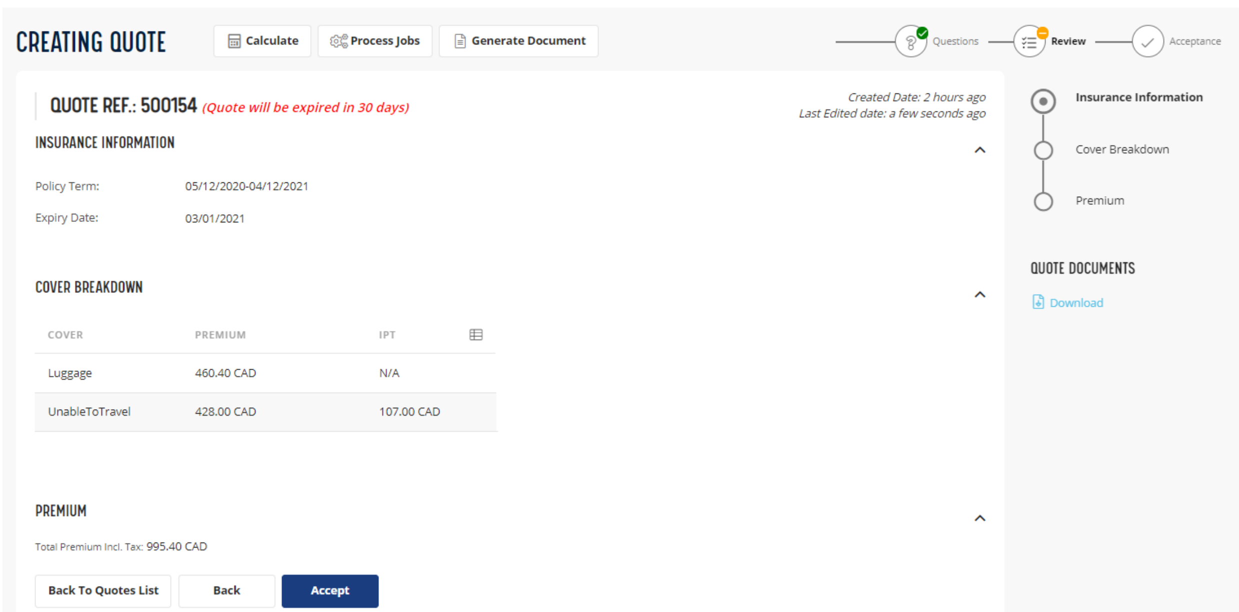
- Select product



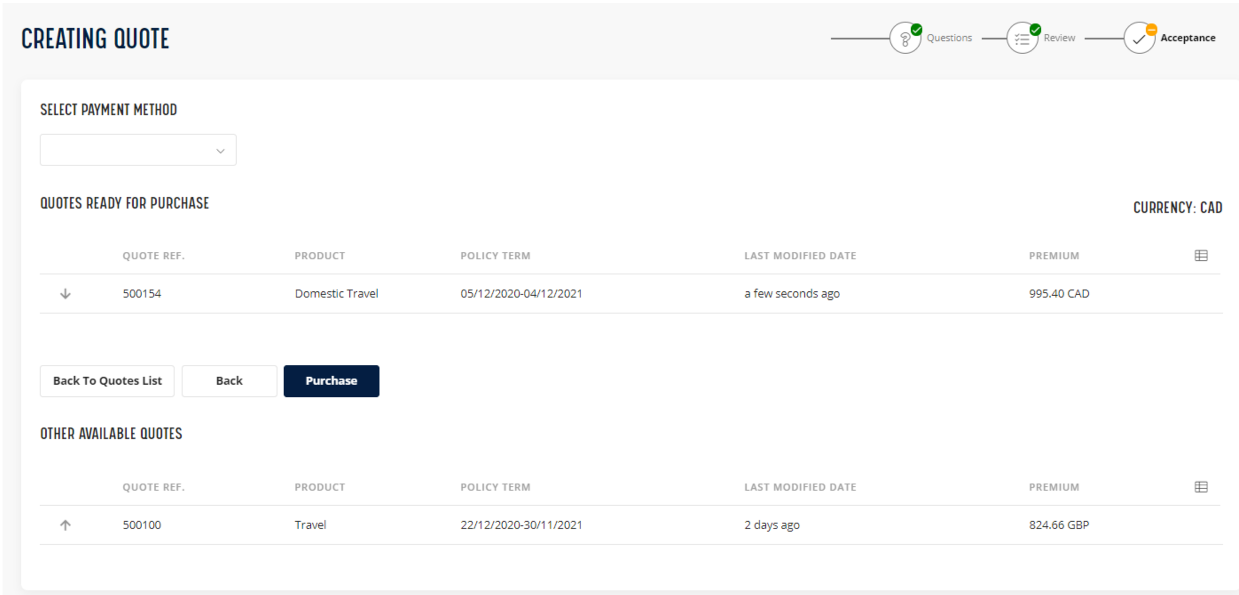
- Questions: after selecting the product, “Questions” page is shown (as below) with all questions defined in the product definition for that product.



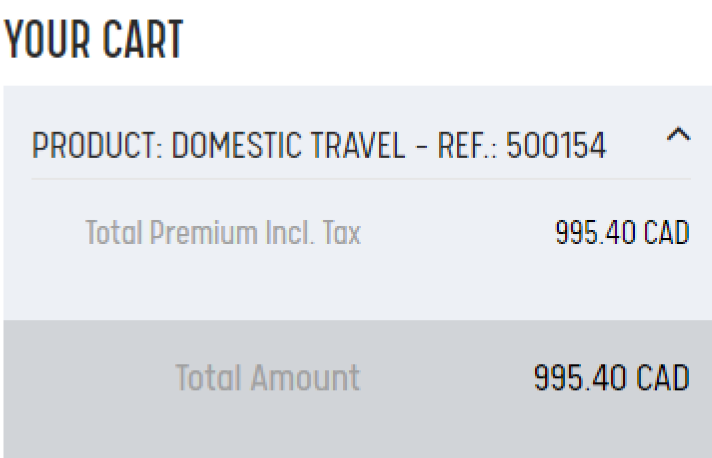
- Review



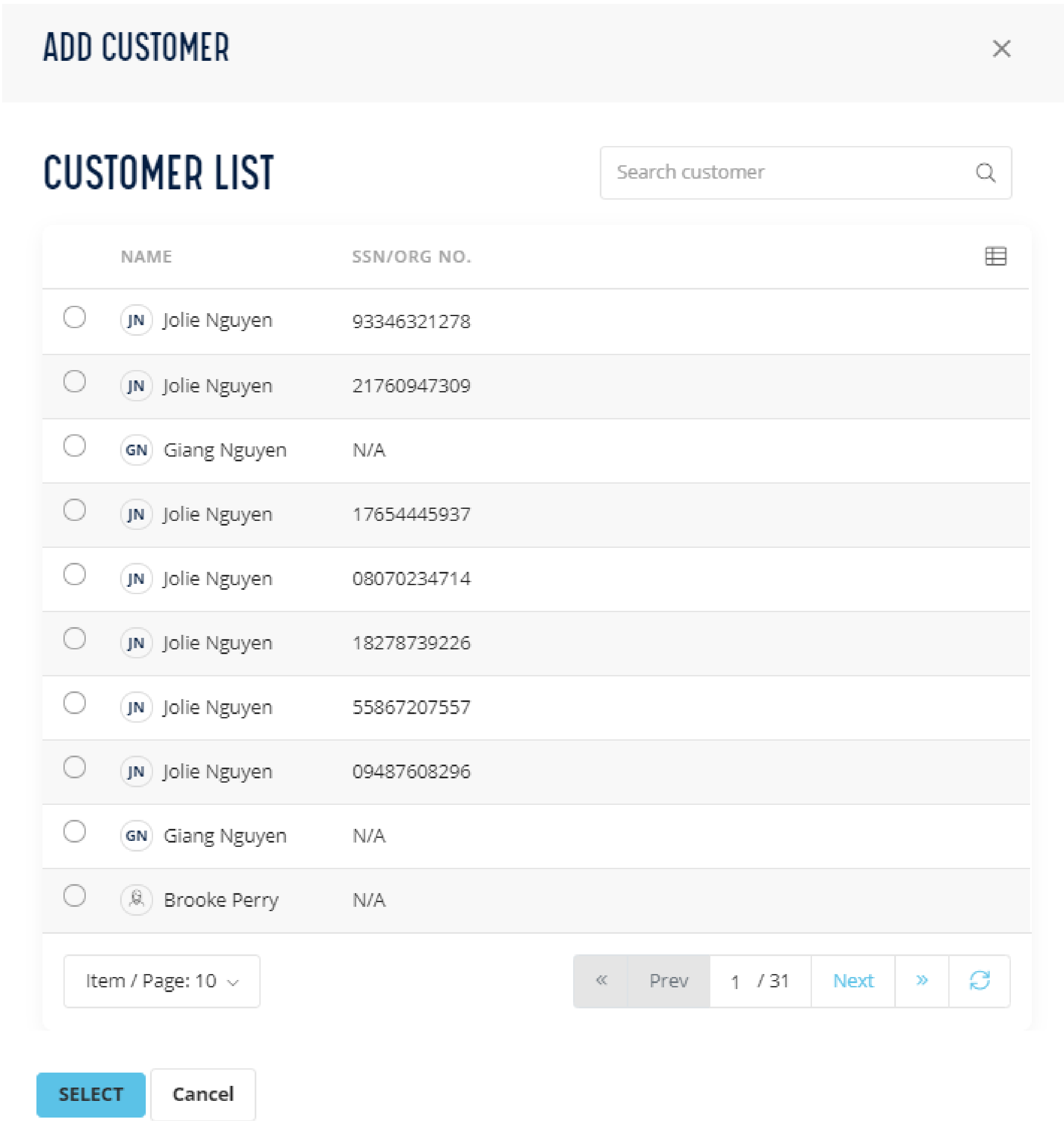
- Acceptance:



2.10.3.2 Shopping cart



2.10.3.3 Attach anonymous quotes to a specific customer



2.11 Global assistants

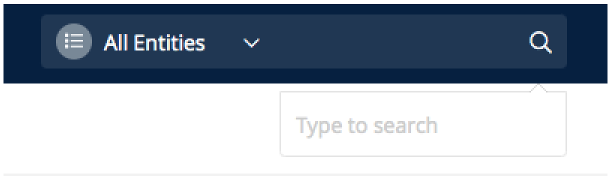
2.11.1 Global Search

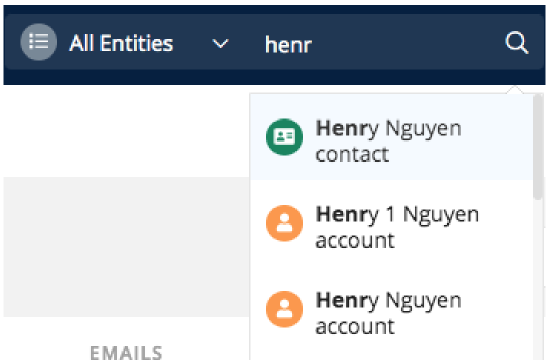
MAIN FUNCTION

This feature allows you to perform the search quickly across multiple entities by inputting a keyword in the Search field. Or you can search across multiple entities or on a specific Entity.

Supported entities: Account, Contact, Lead, Sales, Cases, Notes

SCREENSHOTS





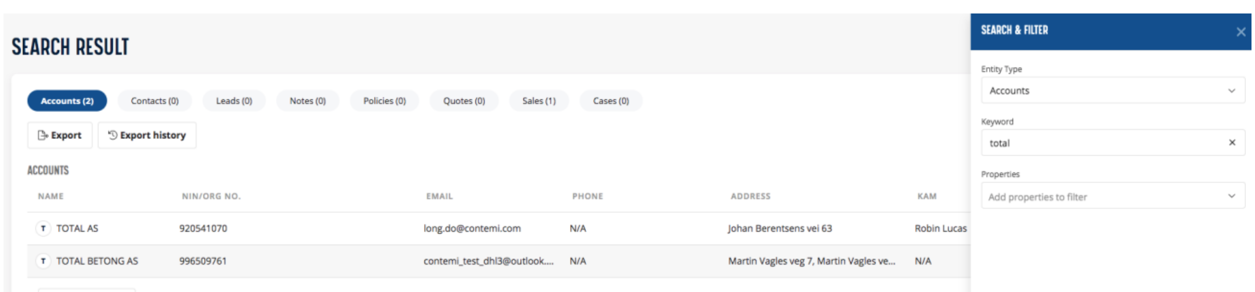
DESCRIPTION

Basic search:

1. Input a keyword into the search field.
2. The system will return the search results with entities which match the keyword.
3. All Entities is selected as default. If you want to search on a specific entity, select that entity and input data in the search field.

Advanced search:

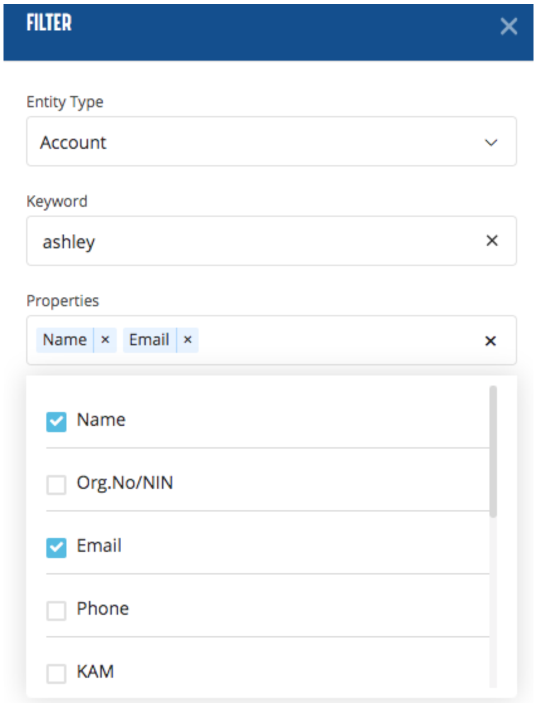
1. Input a keyword into the search field
2. Press Enter
3. The system will return the search results as below



Account is the default Entity.

A filter panel is opened automatically on the right hand side.

4. You can select Search criteria on the Properties field to search. The search criterias varies according to the Entity

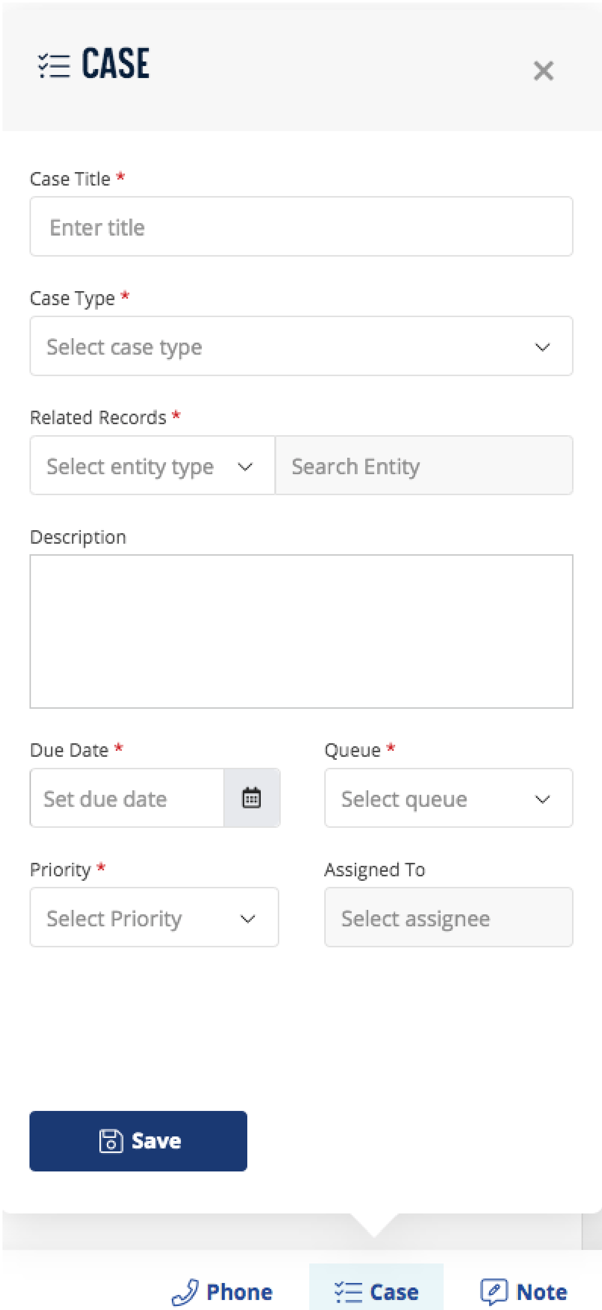


2.11.2 Global Case

MAIN FUNCTION

This function allows you to create a Case right away while you're handling some other tasks in the system.

SCREENSHOT



DESCRIPTION

In order to create a case from Global case menu

1. Click on  on the bottom right corner.
2. Enter data into below fields in Create Case form.
3. Click **Save**

Case type is a combo box and shows the list of workflows that are available in the system

Select entity type is a combo box and allows the user to select an entity type, e.g. Account, Contact, Lead, etc.

Search Entity allows the user to find and select an entity record that belongs to the selected entity type, e.g. Entity type is “Account” then the user can search for accounts, other entities’ records (e.g. Leads) won’t appear in this box.

Description is a free text field.

Due date is a date-time picker.

Queue is a combo box that shows all the task queues to which the logged-in user belongs.

Priority is a combo box with four options: Low, Normal, High, Critical.

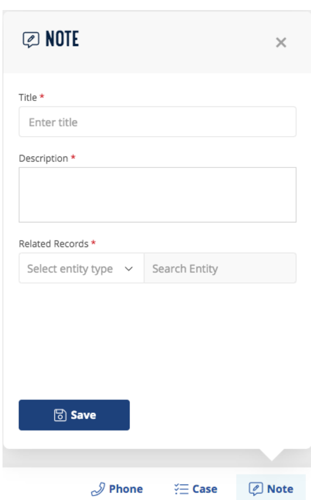
Assigned to show a list of users who belong to the selected queue.

2.11.3 Global Note

MAIN FUNCTION

This function allows you to create a note right away while you’re handling some other tasks in the system.

SCREENSHOTS



DESCRIPTION

In order to create a case from Global case menu

4. Click on Note on the bottom right corner.

5. Enter data into below fields in Create Note form.
6. Click **Save**

Title: is a free text field

Description: is a free text field

Select entity type is a combo box and allows the user to select an entity type, e.g. Account, Contact, Lead, etc.

Search Entity allows the user to find and select an entity record that belongs to the selected entity type, e.g. Entity type is "Account" then the user can search for accounts, other entities' records (e.g. Leads) won't appear in this box.

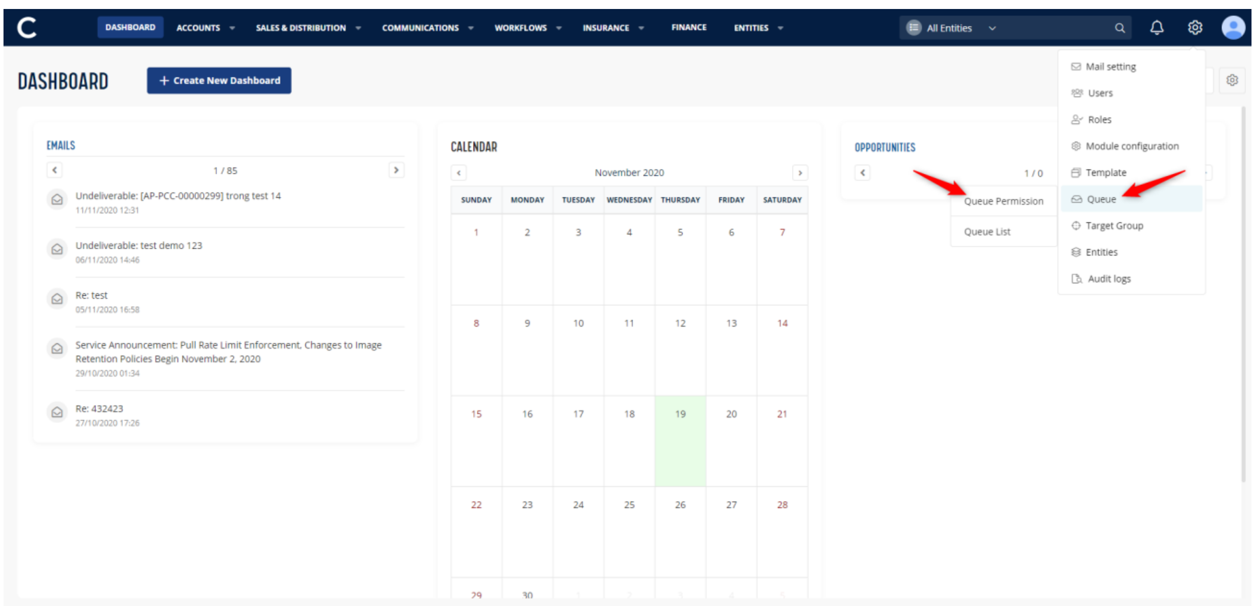
2.11.4 Queue

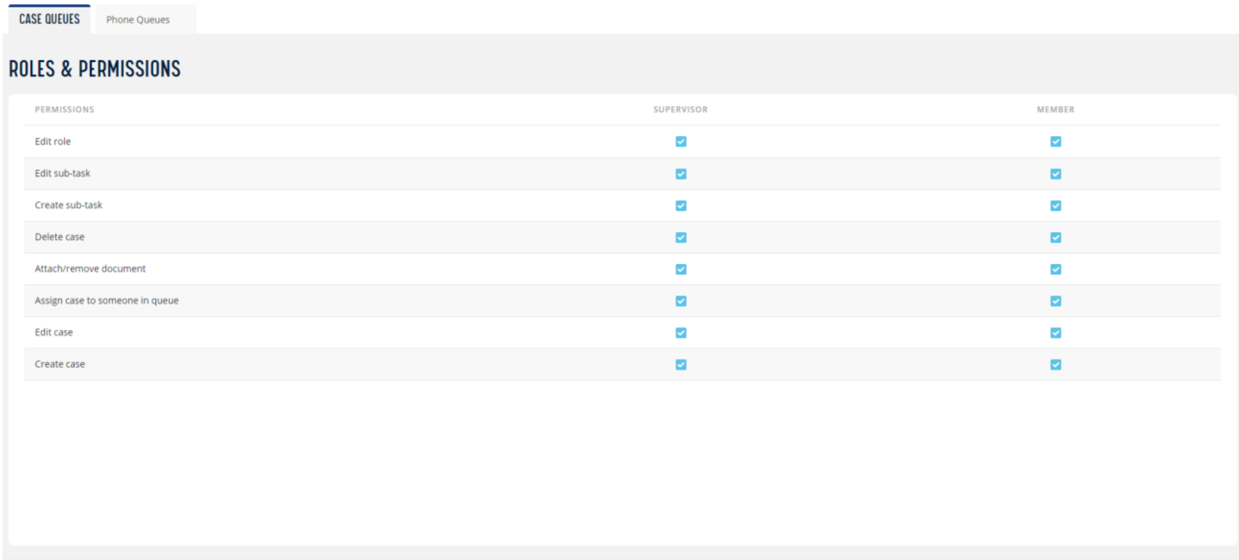
2.11.4.1 Queue permissions.

MAIN FUNCTION

This feature allows you to configure the permissions of the members in queues. There are 2 predefined roles: Member and Supervisor.

SCREENSHOT





HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Management icon, click on Queue > Queue permission

DESCRIPTION

There are two types of queues: Case queue and Phone queue

There are two predefined roles: Member and Supervisor.

The user can manage (add/remove) permissions for Member and Supervisor roles of Case queues and Phone queues.

HOW TO ADD PERMISSIONS TO ROLE

1. Open Roles & Permissions page
2. Tick/Untick on tickbox to add/remove a permission.

Case queues permissions:

- Create case
- Edit case
- Assign case to someone in queue
- Attach/remove document
- Delete case
- Create sub-task
- Edit sub-task

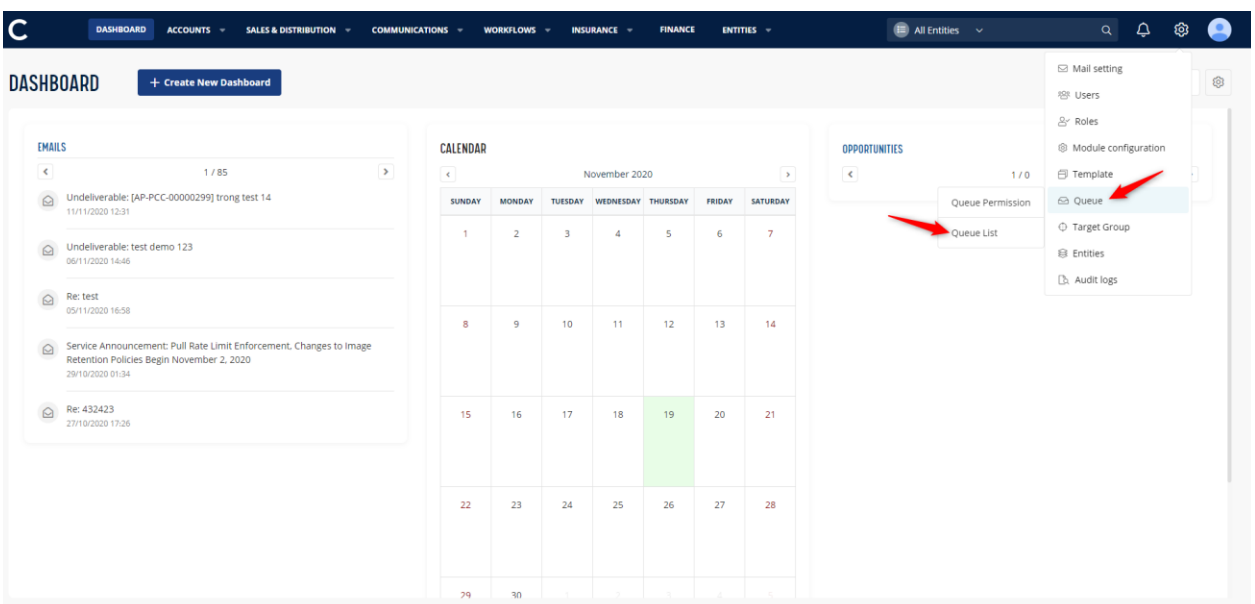
Phone queues permissions:

- Make outgoing call
- View live call list
- Add user and assign role to user
- View status of all people in queue

2.11.4.2 Queue permissions.

Queue lists.

SCREENSHOT



HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Management icon, click on Queue then select Queue List

DESCRIPTIONS

There are two types of queues: Case queue and Phone queue.

On the Queue list, users can view all the existing queues of the system.

You can create new queues, add users into queues and assign roles to the users in Queue so that the users can perform the actions.

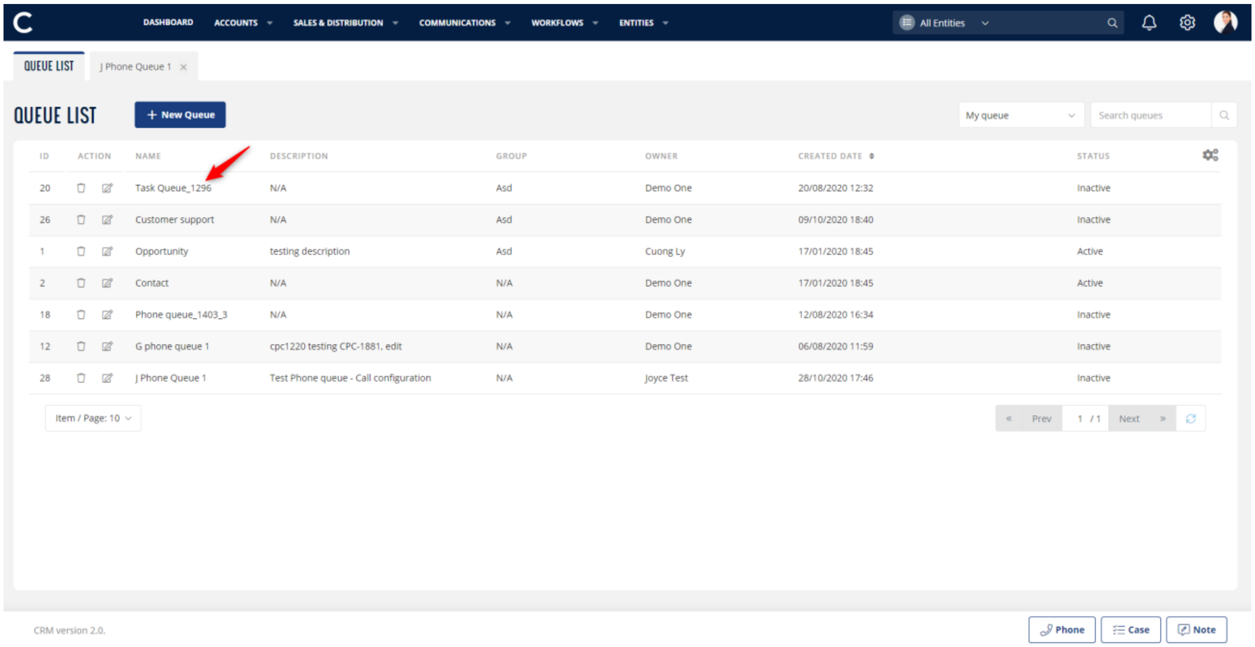
CREATE QUEUE

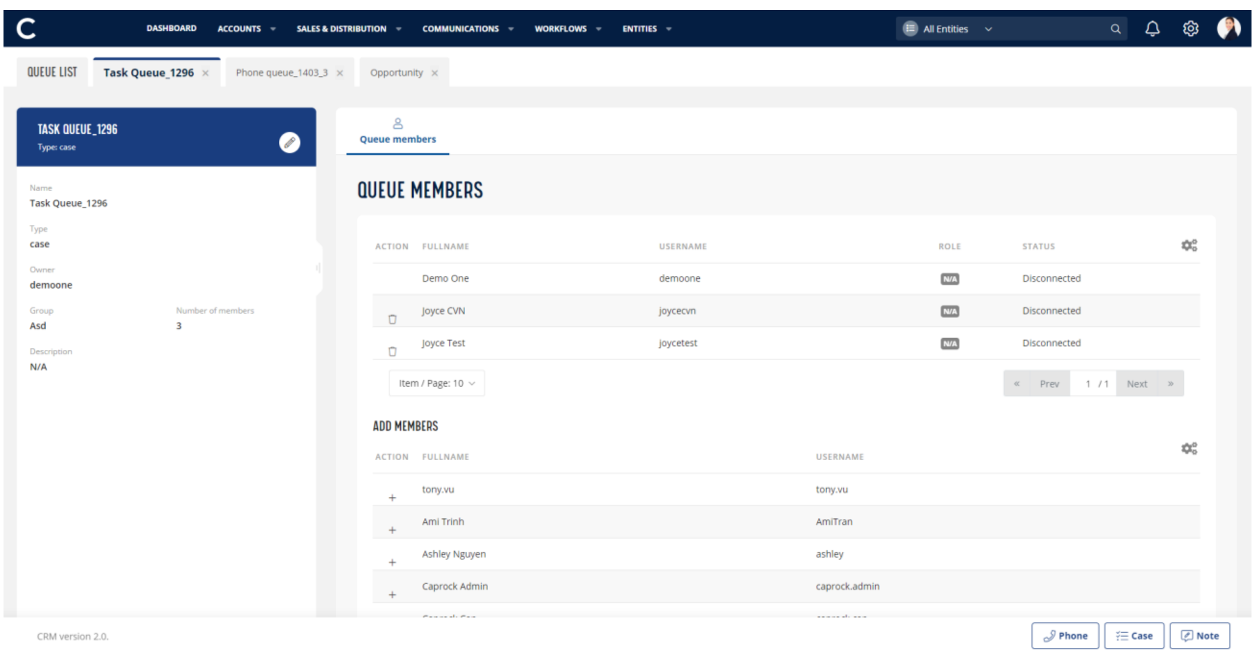
- Click the + Create button on the Queue List page then Create Queue form is displayed.
- Name: This is a mandatory and free text field
- Type: A drop-down list with two options: Phone and Task. This is a mandatory field.
- Owner: A drop-down list with all the available users. This is a mandatory field.
- Description: A free text field, the user can input more information/description for the queue. This is not a mandatory field.
- After inputting all the mandatory fields, user can click Save button to create a new queue or click Cancel to cancel creating the queue. When a queue is created successfully, it will be listed in the queue list.

QUEUE LIST

- The queue list is filtered and displayed the list that the user owns or belongs to. Users can view other queues by selecting Other queue…
- Search queue: user can search for a queue by queue's name.
- Action: Delete/Edit users can click these buttons to delete/edit a queue from the queue list.
- Name
- Description
- Owner
- Created date
- Status: Active/Inactive.
- Click to config which column will be shown on Queue List: Id, Action, Name, Description, Group, Owner, Created Date, Status.

QUEUE DETAILS/ MANAGE QUEUE MEMBERS





- Users can access the Queue details page by clicking Queue Name.
- Users can open multi queues at the same time.
- Queue info-box will show queue name, type, queue owner, group, number of members in queue and queue description.

Queue members section shows the list of members that belong to the queue.

- Click at the Action column to remove a member from the queue.

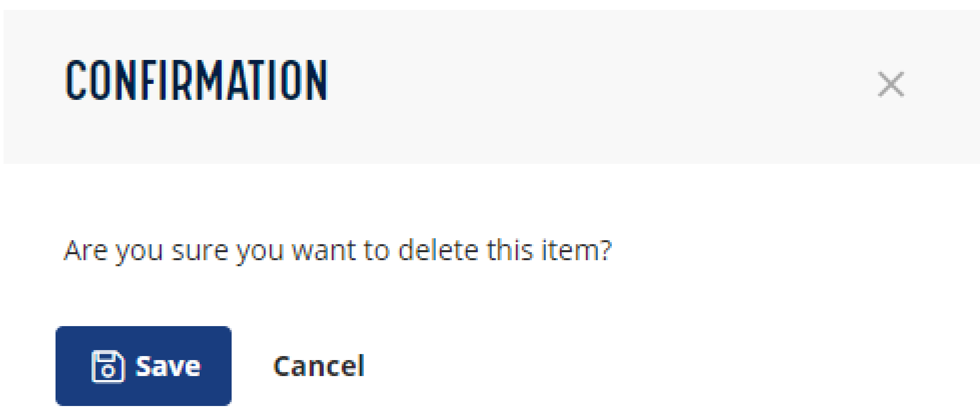
- Select a role (Supervisor/Member) from Role drop-down to assign a role for a member in the queue.
- Click to config which column will be shown on the Queue Members section: Action, FullName, Username, Role, Status.

  Add members section: shows the list of members that don't belong to the queue.

- Click + at the Action column to add a member to the queue, then the member will disappear in the Add Members section and appear in Queue Members.
- Click to config which column will be shown on the Add Members section: Action, FullName.

DELETE QUEUE

- Click then a confirmation pop-up is displayed.



  - Click Save to delete the queue.
  - Click Cancel to cancel.

EDIT QUEUE

- User can edit queue details directly from queue list by clicking at the Action column, then the Edit Queue form will be displayed. User can update the information of the queue then click Save to update the change and click Cancel to cancel updating.
- Users can also edit queue details by clicking the Edit button on the Queue info-box, Edit Queue form will be displayed, and the user can update the information of the queue.

2.12 Entity

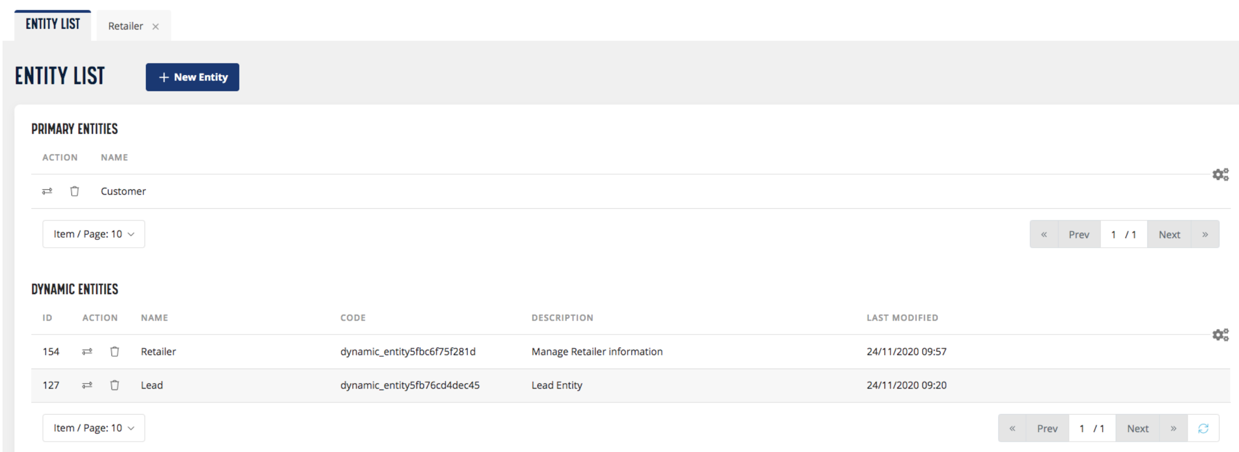
MAIN FUNCTION

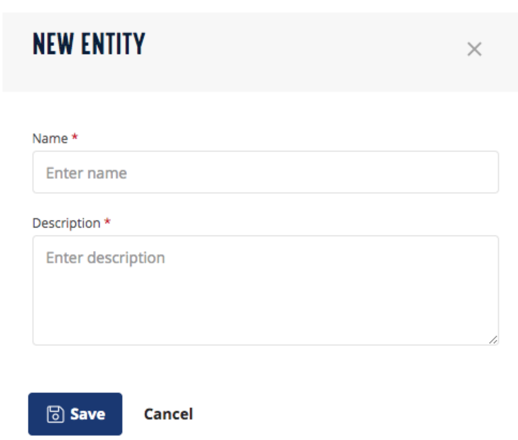
Entity module allows you to manage the primary and dynamic objects such as custom fields, page layouts.

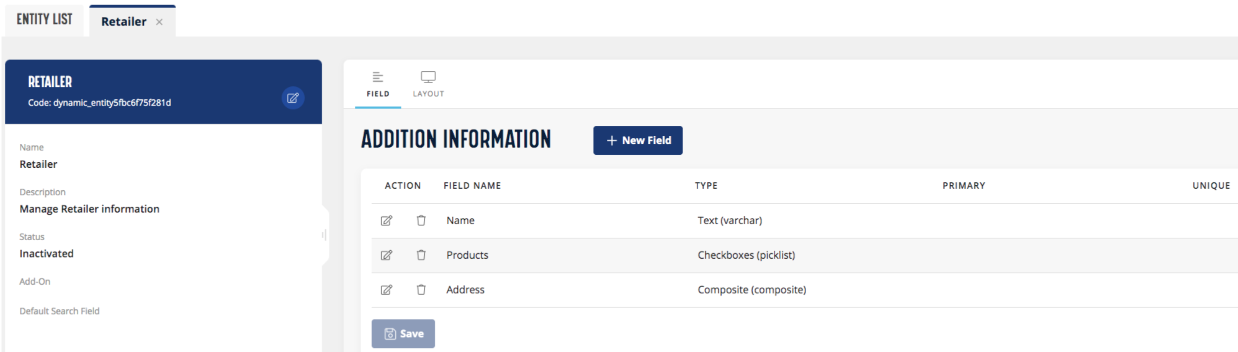
Primary objects are the objects that are available in the system such as Account, Lead.

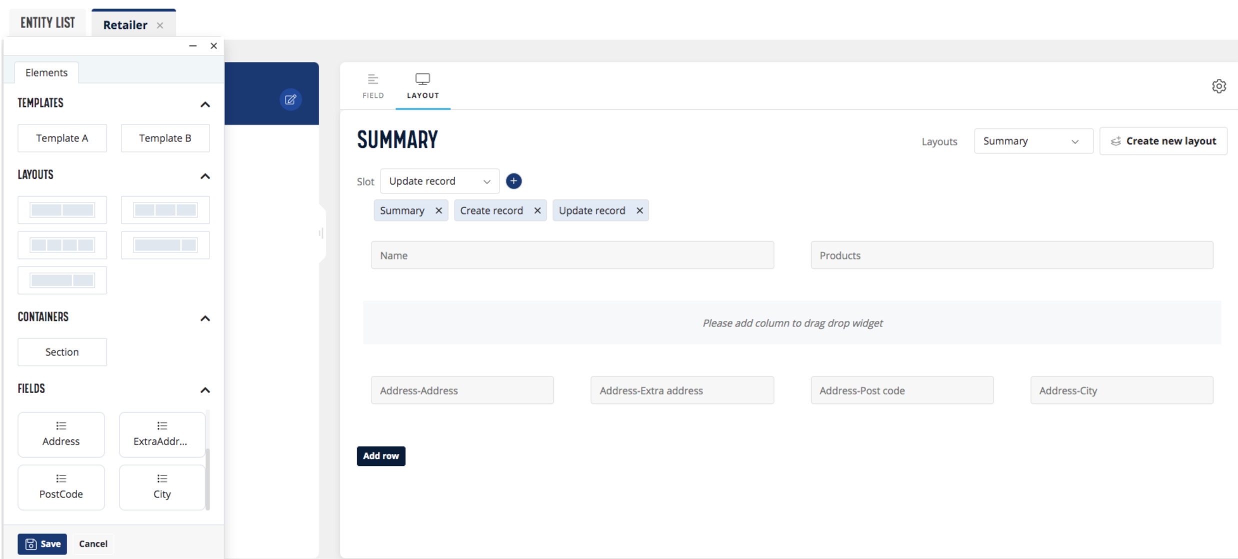
Dynamic object is one that you created.

SCREENSHOT









HOW TO FIND

1. Enter the URL into the system and log in
2. Click the Setting icon on the top right corner
3. Select Entities

DESCRIPTION

ENTITY LIST

There are 2 sections in Entity list: Primary entities and Dynamic entities

Primary objects are the objects that are available in the system such as Account.

Dynamic object is one that you created.

HOW TO CREATE A NEW ENTITY

1. On Entity list, click **+ NEW ENTITY** button

2. Enter **Name** of the entity and **Description**

Note: there is no Validation for the Name field of the entity. However, it's better to use a unique Name for Name field to avoid misunderstanding.

HOW TO CREATE CUSTOM FIELDS

1. On the Entity list, click on the name of an entity which you want to add custom fields. The entity will be opened in a new tab next to Entity list.
2. Click **+ New Field** button
3. Enter data into below fields:

   Name: This is the name of the field

   Data Type: can be text, number, checkbox, etc.

   Required: this new custom field will become a mandatory field if Required checkbox is checked

   Unique: data on this new custom field will be unique for a record if Unique checkbox is checked.

4. Click **Save**

HOW TO DELETE A CUSTOM FIELD

Note: You cannot delete the system fields. Systems fields are ones that are created by the system. System fields are available on Primary entities.

1. On Entity list, click on the name of an entity to open the Entity summary

2. On the Field tab, click on the Delete button to delete the field you want.

3. Click **Save**

HOW TO CONFIGURE LAYOUT

On Entity list, click on the name of an entity to open the Entity summary

Open Layout tab

There is a field called "Layout". It's a dropdown list with 4 options:

Index/List view: choose which fields to display on the Entity list. This is what you should see when navigating to an Entity list.

Search: choose which fields that the entity can be searched by.

Summary view

Create/Update view

Configure layout for Index/List view:

Select Index/List view on Layouts dropdown list.

Click the Config layout button. Configuration popup will be opened.

Drag the fields you want to have on the Entity list from Configuration popup to the Layout form

Click **Save** on Configuration popup

Configure layout for Search view:

Select Search view on Layouts dropdown list.

Click the Config layout button. Configuration popup will be opened.

Drag the fields you want to have on the Entity list from Configuration popup to the Layout form

Click **Save** on Configuration popup

Configure layout for Summary view:

Select Summary view on Layouts dropdown list.

Select Summary slot on Slot field and click + button

Drag the layout from Configuration popup and drop to the Summary page.

There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

Ex: If you select 6:6 layout for a row, 2 widgets can be added.

If you select 4:4:4 layouts, 3 widgets can be added.

Drag the widget from Configuration popup and drop in the layout.

Click **Save** on Configuration popup.

Configure layout for Create/Update view:

Select Create/Update view on Layouts dropdown list.

Select Create, Update slot on Slot field and click + button

Drag the layout from Configuration popup and drop to the Summary page.

There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

Ex: If you select 6:6 layout for a row, 2 widgets can be added.

If you select 4:4:4 layouts, 3 widgets can be added.

Drag the widget from Configuration popup and drop in the layout.

Click **Save** on Configuration popup.

HOW TO EDIT AN ENTITY

On the Entity list, click on the name of the entity which you want to edit. The entity will be opened in a new tab next to Entity list.

Click Edit button

You can edit below information:

Name

Description

Activated (status): If the checkbox is ticked, the entity is ready to use and and can be found in Entity menu

If the checkbox is not ticked, the entity is not ready to use and not viewable in Entities menu

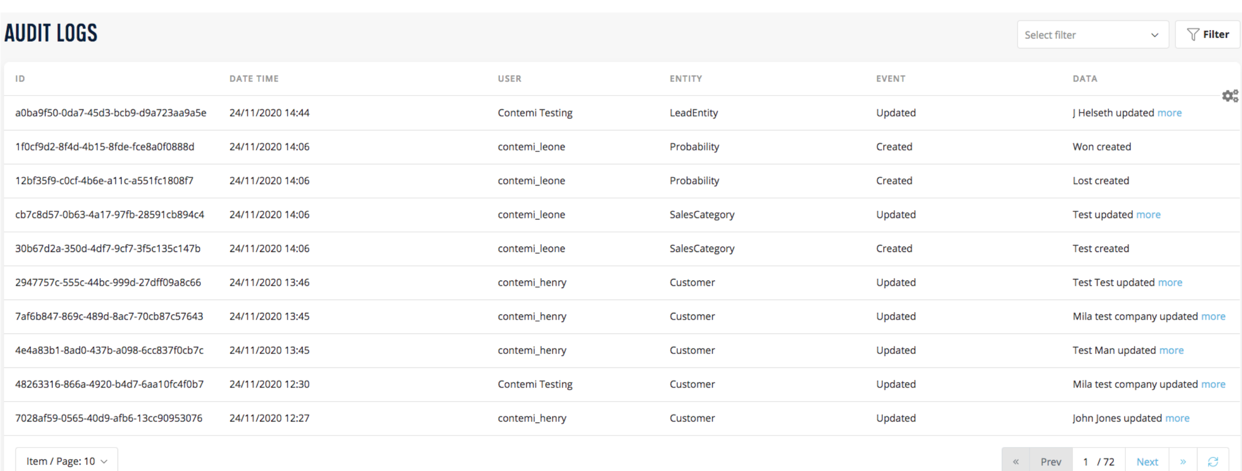
Add-On

2.13 Audit Logs

MAIN FUNCTION

Audit logs feature allows you to track the activities in the system. These activities are viewed and searchable.

SCREENSHOTS



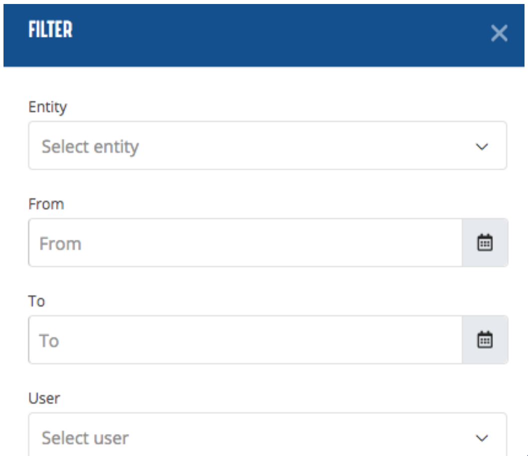
AUDIT LOGS

Select filter | Filter

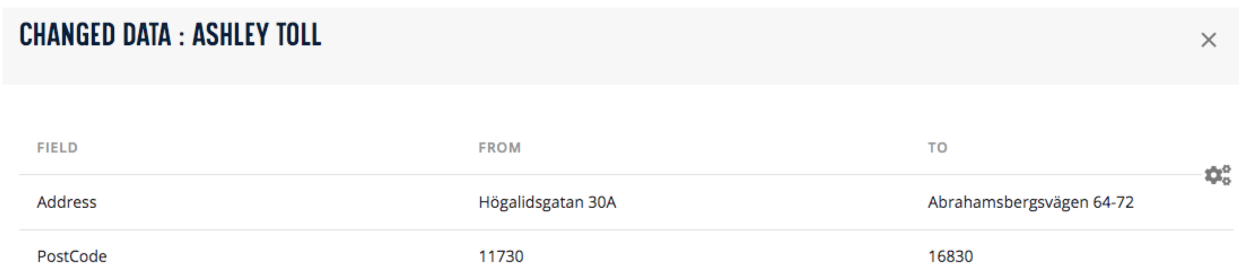
ID	DATE TIME	USER	ENTITY	EVENT	DATA
a0ba9f50-0da7-45d3-bcb9-d9a723aa9a5e	24/11/2020 14:44	Contemi Testing	LeadEntity	Updated	J Helseth updated more
1f0cf9d2-8f4d-4b15-8fde-fce8a0f0888d	24/11/2020 14:06	contemi_leone	Probability	Created	Won created
12bf35f9-c0cf-4b6e-a11c-a551fc1808f7	24/11/2020 14:06	contemi_leone	Probability	Created	Lost created
cb7c8d57-0b63-4a17-97fb-28591cb894c4	24/11/2020 14:06	contemi_leone	SalesCategory	Updated	Test updated more
30b67d2a-350d-4df7-9cf7-3f5c135c147b	24/11/2020 14:06	contemi_leone	SalesCategory	Created	Test created
2947757c-555c-44bc-999d-27dff09a8c66	24/11/2020 13:46	contemi_henry	Customer	Updated	Test Test updated more
7af6b847-869c-489d-8ac7-70cb87c57643	24/11/2020 13:45	contemi_henry	Customer	Updated	Mila test company updated more
4e4a83b1-8ad0-437b-a098-6cc837f0cb7c	24/11/2020 13:45	contemi_henry	Customer	Updated	Test Man updated more
48263316-866a-4920-b4d7-6aa10fc4f0b7	24/11/2020 12:30	Contemi Testing	Customer	Updated	Mila test company updated more
7028af59-0565-40d9-afb6-13cc90953076	24/11/2020 12:27	contemi_henry	Customer	Updated	John Jones updated more

Item / Page: 10

« Prev 1 / 72 Next »



f



HOW TO USE AUDIT LOGS

1. Enter the URL into the system and log in
2. Click the Setting icon on the top right corner
3. Select Audit logs
4. Click the filter button to open the Filter panel on the right side.
5. You can filter the audit logs by

- Entity
- Date from
- Date to
- User

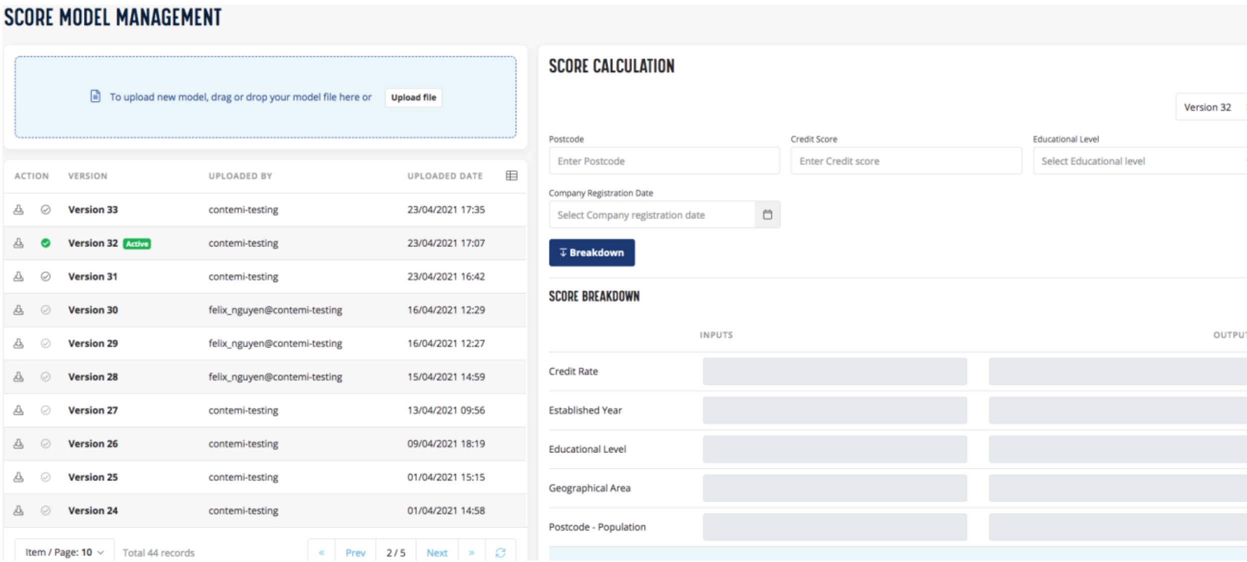
2.14 Scoring Management

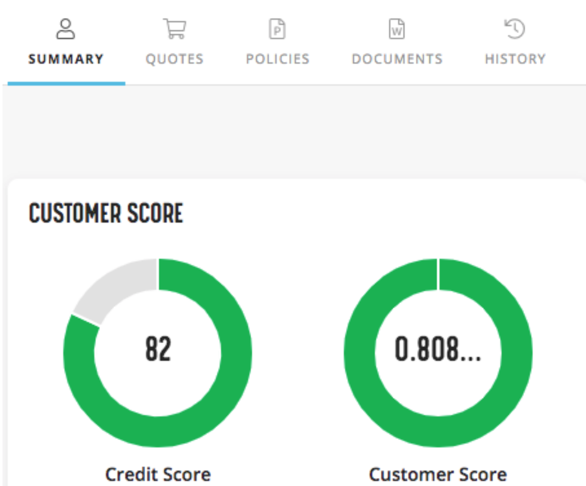
MAIN FUNCTION

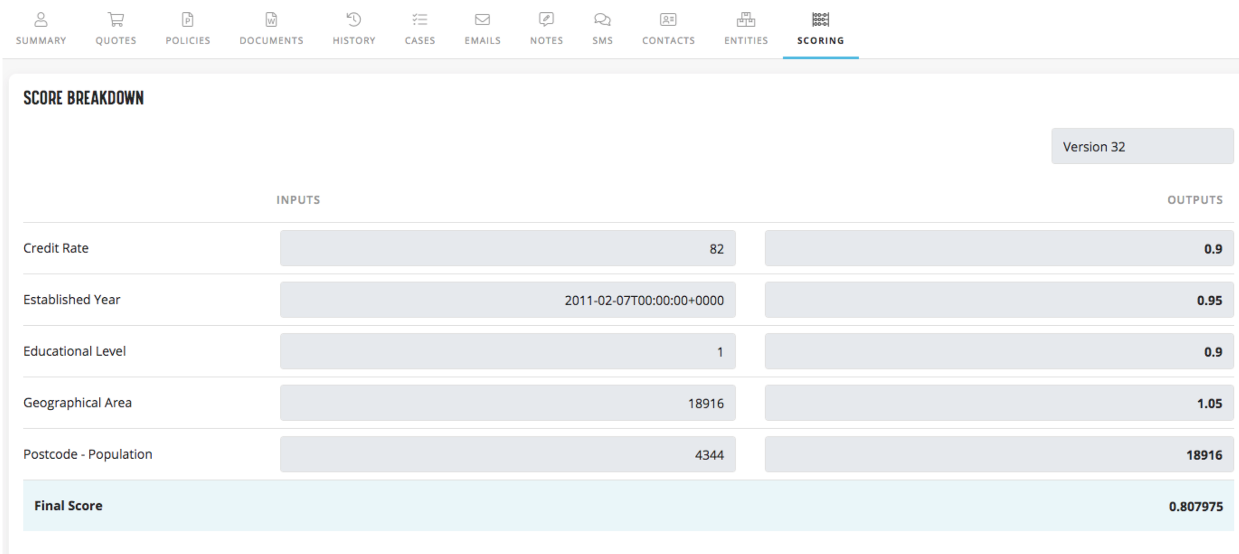
Scoring model helps in scoring/categorizing customers in the CRM.

This is useful to understand how valuable a customer is so that they can differentiate a good customer from a bad customer. This can be then used for many purposes like giving good customers better discounts, better premium rates, and VIP customer service. And they can get statistics about bad customers to prevent selling high risk products to them or carefully checking their claims for fraud etc.

SCREENSHOTS







HOW TO UPLOAD A SCORING FILE

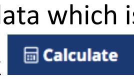
Scoring file should be defined with format so that the system can read it. However, the user can modify the value in the scoring file and upload it.

1. Go to Setting menu -> Scoring management
2. Drag a file into the Upload box and click Submit button

3. The uploaded file is shown on the top of the scoring list.

HOW TO TEST A SCORING MODEL

When a scoring file is uploaded to the system, the user can test to make sure that it is correct before officially using it.

1. Go to Setting menu -> Scoring management
2. On the Scoring calculation tab, select the Version that you want to test. When a version is chosen, the fields which are defined in that version are fetched into the Score calculation tab.
3. Fill data which is used to test and click Apply.
4. Click  button.

HOW TO ACTIVE A SCORING MODEL

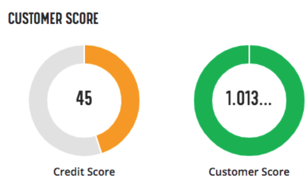
The user needs to activate a scoring model so that it's ready for use. Only one scoring model is activated at a time.

1. Go to Setting menu -> Scoring management
2. On Action column, click on the version that you want to activate it

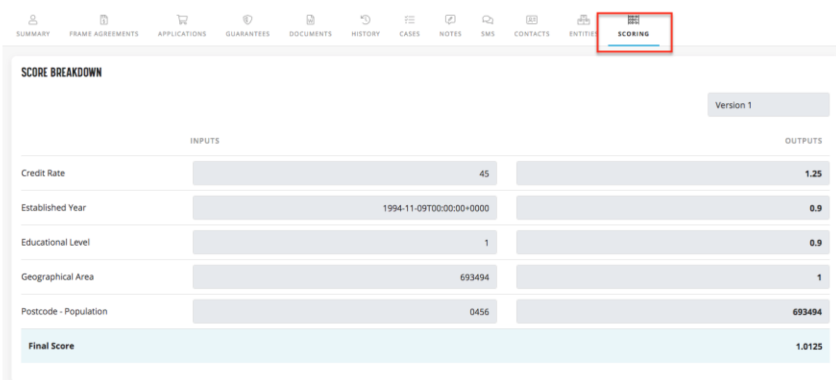
HOW TO READ CUSTOMER SCORE

The customer score is calculated when the customer is created or edited (with enough information to calculate the score)

The user can view customer score in Customer Summary page - Customer score widget



Or Scoring tab to see the breakdown of the scoring factors

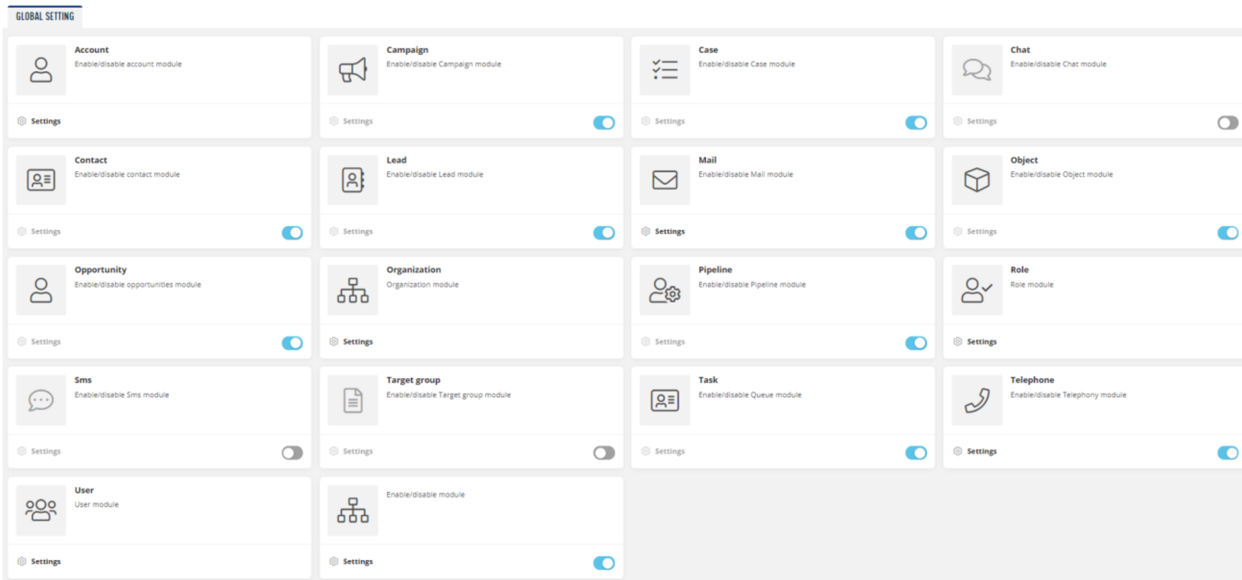


2.15 Module configuration

MAIN FUNCTION

This module allows the administrator to turn on/off the modules that they want/do not want to use and do configuration for each module.

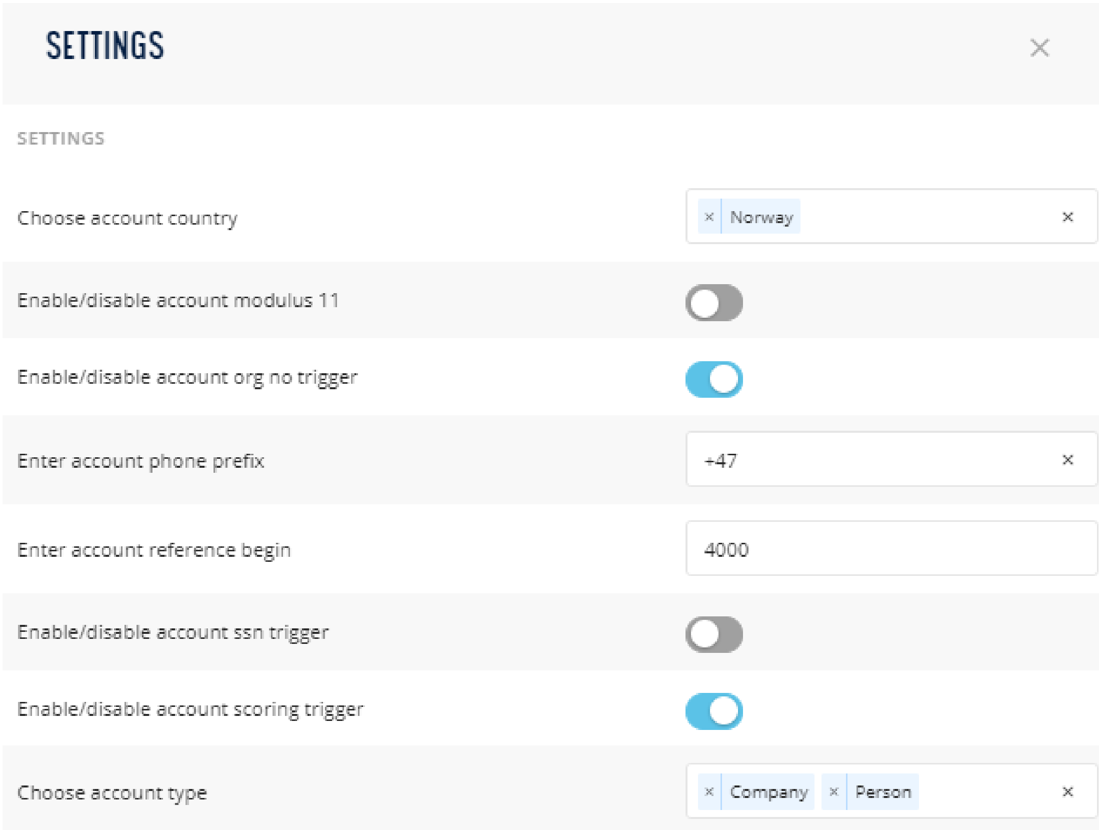
SCREENSHOTS



Account Module

This module cannot be turned off.

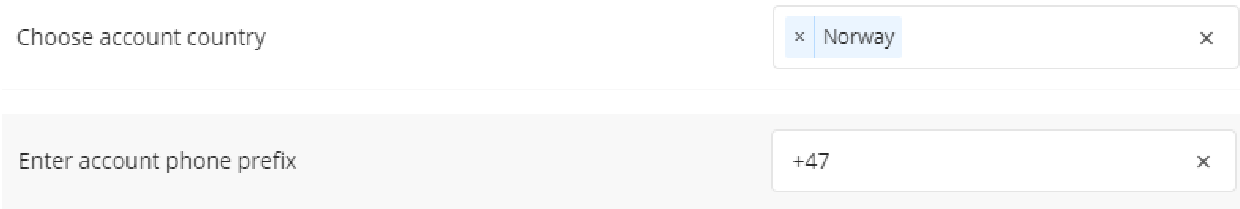
Currently the global settings for this module consist of:



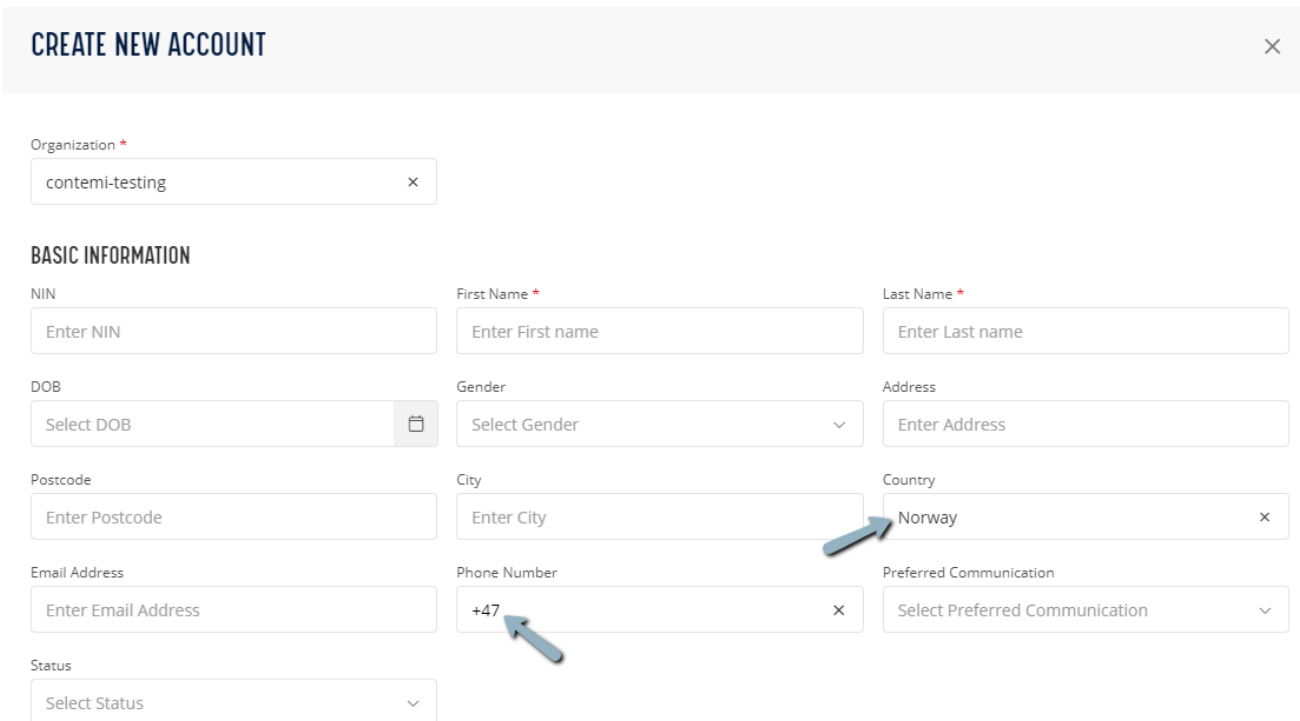
- **Choose account country**: this defines the default value at Country field in Create Account form.
- **Enable/disable account modulus 11**: once enabled, it validates the input at NIN field and throws a validation message if the input doesn't meet Modulus-11 rule.
- **Enable/disable account org no trigger**: once enabled, user can see a magnifying-glass button in "NIN" field. Clicking on the button triggers a search (e.g. from Bisnode) and fill out company-info fields.
- **Enter account phone prefix**: here defines the default country code at Phone fields.
- **Enter account reference begin**: the input is the start number of Account Reference.
- **Enable/disable account ssn trigger**: once enabled, user can see a magnifying-glass button in "NIN" field. Clicking on the button triggers a search (e.g. from Bisnode) and fill out personal-info fields.
- **Enable/disable account scoring trigger**: once enabled, when creating new or editing existing account, it calls the Scoring service to calculate customer score.
- **Choose account type**: two possible options, "Person" and "Company".
  - If both are selected in settings, when creating new account, user needs to choose either "Person" or "Company" in order to navigate to the respective form.
  - If either of them is selected in settings, e.g. Person, clicking on Create account button would directly open the Create Person Account form.

For example:

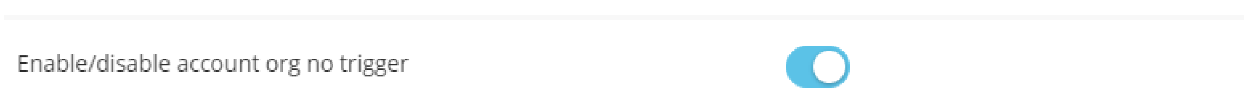
- Choose Account Country is “Norway” and Account Phone Prefix is “+47”



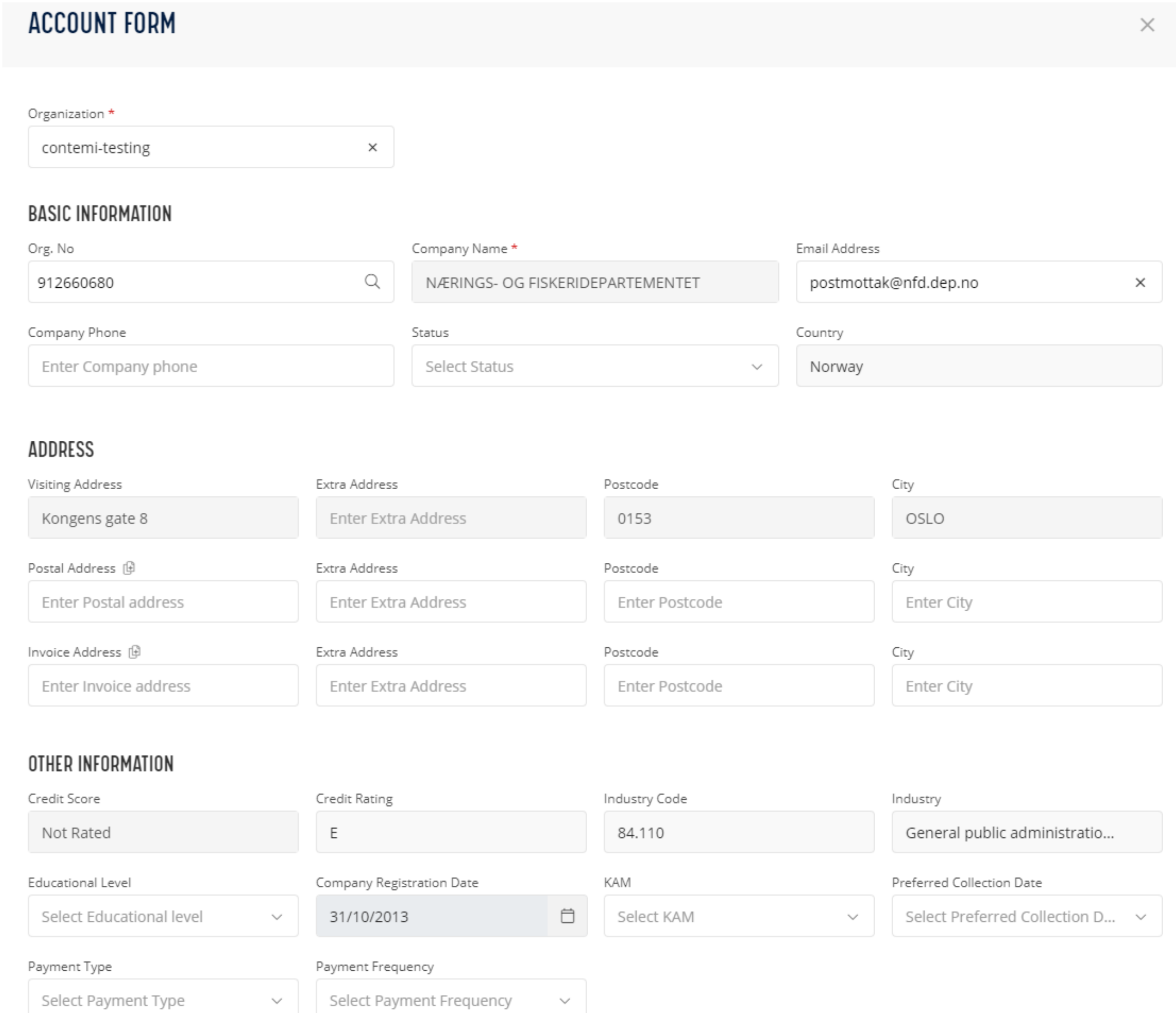
In the Create Account form, the default “Country” is “Norway” and default “Country code” at Phone is “+47”:



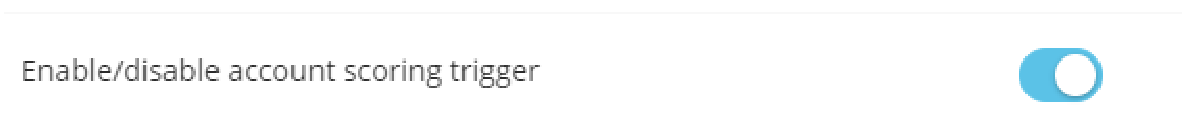
- Account Org. no. trigger: enabled

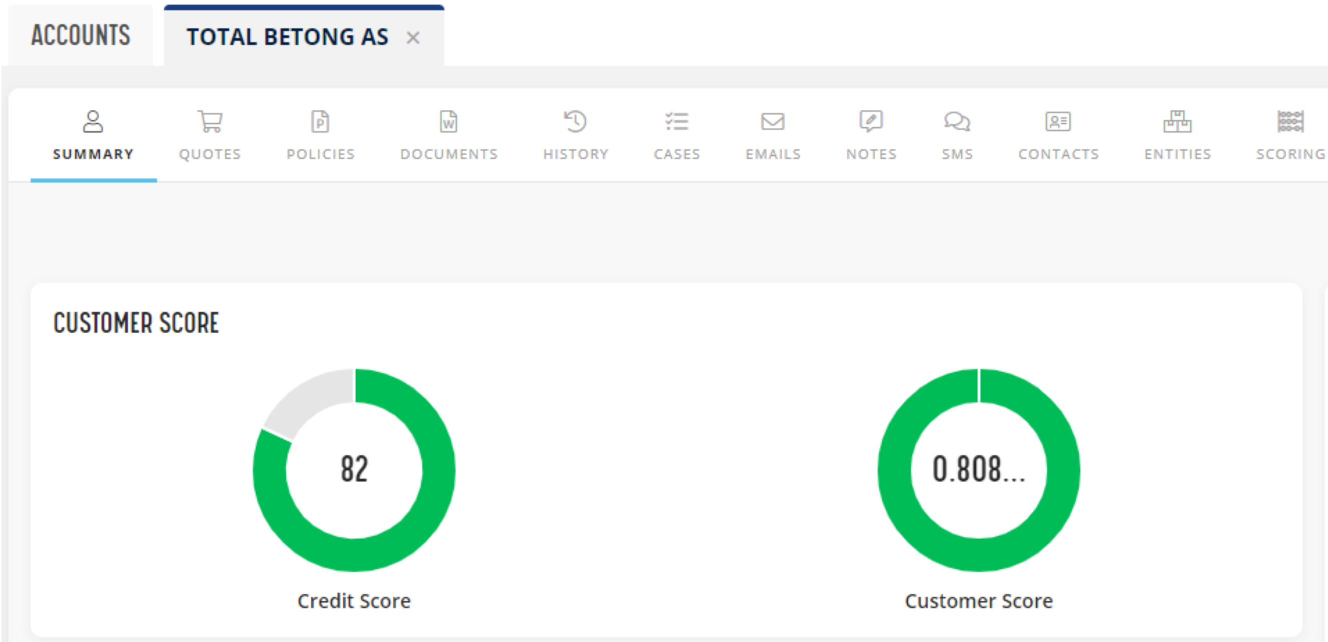


Users can trigger an auto-fill-up to company-info fields:

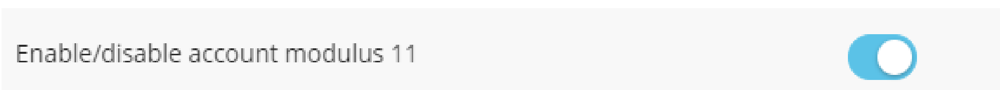


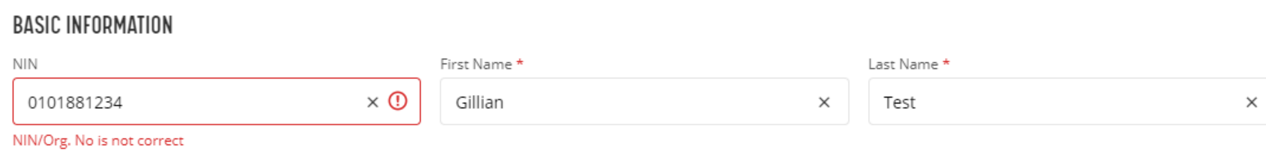
- If Customer Score enabled, users can see the scores at Customer Summary page:



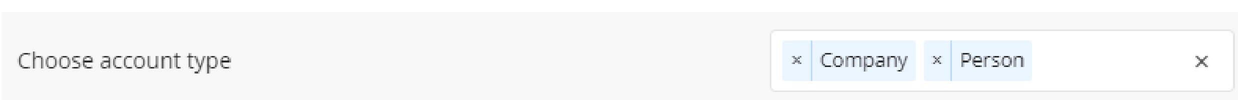


- If Modulus-11 validator is turned on:

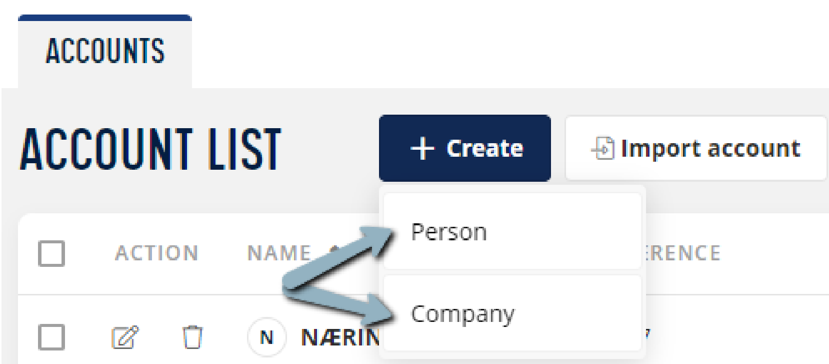




- If Account Type has both options:



Users need to select either of them before navigating to Create Account form:



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